

SUMMIT 2016

ALABAMA ASSOCIATION FOR FINANCIAL PROFESSIONALS



11:30am to 12:00pm

Lunch & Opening Remarks

Howard Finch, Dean, Professor of Finance, Brock School of Business, Samford University

12:00pm to 12:50pm

Birmingham's Diverse Economy

Honorable William A. Bell, Sr., Mayor of Birmingham, Alabama

Mayor Bell will discuss Birmingham's diverse economy and share information about the region's 3,500 jobs created and \$1.1 billion in capital investment last year. He will discuss the economic development efforts that resulted in a new entertainment district, a new baseball stadium and the expansion of the Shuttlesworth International Airport.

12:50pm to 1:00pm

Break

1:00pm to 1:50pm

Protective Life Strategic & Financial Overview

Rich Bielen, President and Chief Operating Officer, Protective Life Corporation

Protective Life offers a broad portfolio of life insurance, retirement solutions and asset protection insurance. Founded by a former Alabama state governor in 1907, Protective is listed on the Fortune 1000 list with annual revenues of approximately \$4.4 billion and assets of approximately \$70.5 billion. Protective Life Corporation includes three other principal operating subsidiaries: Protective Life & Annuity Insurance Company, West Coast Life Insurance Company and Lyndon Insurance Group, Inc. The company home office is located in Birmingham, and its more than 2,300 employees are located in offices across the United States.

1:50pm to 2:00pm

Break

2:00pm to 2:50pm

Navigating the New Treasury Investment Era

Ed Baldry, CEO - EMEA, Institutional Cash Distributors

Danette Jones, Vice President - Business Development, Institutional Cash Distributors

Institutional Cash Distributors (ICD) will present the latest in institutional products, portal innovations, risk management advances and strategies for better managing the fast approaching regulatory reform of SEC 2a-7 on October 14, 2016 as well as changes to Basel III.

2:50pm to 3:00pm

Break

3:00pm to 3:50pm

Leveraging Treasury Technology to Prevent Fraud & Cybercrime

Bob Stark, Vice President of Strategy, Kyriba

Every day we hear more stories about fraud, hacking, and misappropriation of corporate funds. As the guardian of financial assets, Treasury has a significant responsibility to protect financial data and corporate funds from unauthorized access and use. In this presentation, we will explore the different ways that treasury technology can enable treasury teams to protect against fraud and cybercrime, including:

How to protect the front door: logging in to your treasury applications
Leveraging the cloud to increase data security
Protecting the payment

Implementing full separation of duties across all treasury workflows
The role of external audit reports such as SSAE-16, SOC1, SOC2
Standard settlement instructions

3:50pm to 4:00pm

Closing Remarks by Trent Green, Alabama AFP President

Speaker Biography

Richard J. Bielen

President and Chief Operating Officer
Protective Life Corporation



Rich Bielen is President and Chief Operating Officer of Protective Life Corporation. He joined Protective Life in 1991 with responsibility for the company's securities portfolio and became Chief Investment Officer and Treasurer in 2002. He became Vice Chairman and Chief Financial Officer in 2007. In January, 2016, Mr. Bielen was named President and Chief Operating Officer. Mr. Bielen began his career at Arthur Andersen and Co. in 1983 and left as a Senior Accountant in 1986. He then joined Oppenheimer & Co., Inc. as a sales analyst focused primarily on new product development, eventually earning the position of Senior Vice President. He has over 30 years of experience in the financial services industry. Mr. Bielen is a Certified Public Accountant and serves on the boards of The United Way of Central Alabama, The Alabama Trust Fund and Children's of Alabama. He earned a Master of Business Administration and a Bachelor of Science degree from New York University.

William A. Bell, Sr.

Mayor of Birmingham, Alabama

Honorable William A. Bell, Sr. was sworn in for his second term on October 22, 2013 as the 33rd Mayor of the City of Birmingham. As the Mayor of the City of Birmingham, Mayor Bell has overseen more than a billion dollars in economic development for the City including a new entertainment district, new baseball stadium and the expansion of the Shuttlesworth International Airport. Mayor Bell is a graduate of the University of Alabama at Birmingham where he received his Master's Degree in Psychology and Guidance Counseling. He also holds a Doctorate in Jurisprudence from Miles Law School. Mayor Bell is married to Dr. Sharon C. Bell, an administrator with the Birmingham City School System, and has two children: Judge William Anthony (Tony) Bell, Jr., and Jillian Bell, and two grandsons.



Danette Jones

Vice President, Business Development
Institutional Cash Distributors (ICD)



Danette joined ICD in February 2016 as Vice President of Business Development. She is responsible for business development and client relationship management in the New York Tri-State Area and the U.S. Southern territory that includes Alabama, Arkansas, Kentucky, Louisiana, Mississippi and Tennessee. Prior to joining ICD, Danette was Treasury Manager at Turing Pharmaceuticals AG, working directly with the Treasurer in the development of a global treasury department. Prior to Turing, she was a Senior Treasury Analyst specializing in international treasury services and European investments at the Coca-Cola Company where she managed a \$12 billion portfolio. Danette was also a Treasury Analyst at The Wendy's Company and worked with Regions Bank and Bank of New York Mellon. Danette has a Bachelor's Degree in Accounting from the University of Alabama at Birmingham. She is an AFP Certified Treasury Professional.

Edwin P. Baldry

CEO, EMEA

Institutional Cash Distributors (ICD)

Ed spearheaded ICD's expansion into Europe; splitting his time between London, and the United States. In addition to his role of CEO Europe, Ed manages ICD's global sales force. Prior to co-founding ICD, Mr. Baldry served as Director of the Institutional Money Fund business at Deutsche Bank/Scudder from 1997. Over \$20 billion was raised under his leadership. His previous position was as Vice President and National Sales Director for BISYS Investment



Services where he worked exclusively with institutional cash investors. Mr. Baldry has also held various service and account management positions with other organizations, including operations specialist at Kidder, Peabody & Company. He has worked and lived in many major U.S. financial centers including Boston, Chicago, and San Francisco representing over 500 corporations and their cash investment needs. Mr. Baldry earned his Bachelor of Arts degree from San Diego State University. He holds Series 6, 63, 7, and 24 licenses, and is licensed in the United Kingdom. He is an active member of the Association of Financial Professionals, the Treasury Management Association of New England, and the Association des Trésoriers d'Entreprise à Luxembourg (ATEL).

Bob Stark

Vice President of Strategy

Kyriba

Bob Stark is responsible for global product strategy and market development at Kyriba. Bob is a 18-year veteran in the treasury technology industry having served in multiple roles at Wall Street Systems, Thomson Reuters, and Selkirk Financial Technologies including product management and strategy. Bob is a regular speaker at treasury conferences including AFP National, Sibos, and regional AFP events. He holds a BBA in finance and marketing from Simon Fraser University in Vancouver.

