

SUMMIT 2016

ALABAMA ASSOCIATION FOR FINANCIAL PROFESSIONALS

Thursday, September 22, 2016

11:30 a.m. to 4:00 p.m.



Samford University – Brock School of Business
800 Lakeshore Drive, Birmingham, AL 35229

register online
www.AlabamaAFP.org/2016-Summit

The Alabama Association for Financial Professionals
is a member of the Birmingham Financial Alliance

*Focus on today's hot
topics in financial
planning and cash
management with
industry veterans plus
participate in dynamic
discussions with
colleagues*

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SCHEDULE & DESCRIPTIONS

11:30am to 12:00pm

Lunch & Opening Remarks

Howard Finch, Dean, 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.

1:00pm to 1:50pm

Protective Life Strategic & Financial Overview

Rich Bielen, President and COO, 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.

2:00pm to 2:50pm

Navigating the New Treasury Investment Era

Ed Baldry, CEO - EMEA, Institutional Cash Distributors

Danette Jones, VP- 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.

3:00pm to 3:50pm

Leveraging Treasury Technology to Prevent Fraud & Cybercrime

Bob Stark, Vice President, 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:

- New password protection techniques to avoid spear phishing
- Leveraging the cloud to increase data security
- Strengthening payment approvals and authentication
- Standard settlement instructions
- Implementing full separation of duties across all treasury workflows
- The role of external audit reports such as SSAE 16, SOC1, SOC2

3:50pm to 4:00pm

Closing Remarks by Trent Green, Alabama AFP President

CONTINUING EDUCATION CREDITS

Sessions have been designed to offer continuing education credits for CPE, CTP and FP&A programs. It is the responsibility of the attendee to submit requests for continuing education credits to the appropriate organization.

CPE

Credit



**Certified
Treasury
Professional®**



FP&A®

**Certified Corporate
Financial Planning &
Analysis Professional**

FEES

AAFP Members:
Included in
Membership Fees

Non-Members: \$50

On-Site / Door
Registration incurs a
\$10 convenience fee