



CRF Credit & A/R Forum—Fort Lauderdale, FL

Monday October 23

- 8:00 - 12:00 **Technology Breakout Sessions - Various Provider User Group Meetings - Separate Registration Required**
- 1:00 - 1:15 **Opening Remarks**
- 1:15 - 2:15 **What are the Real “Costs to Service” a Customer - Robin Walker, Caliber Services** - This session reviews concepts related to the financial burden of an organization to service a customer. The focus of the presentation is a systemic approach of building a dashboard. It includes the financial implications driven by customer behavior, activities regarding their performance and the associated costs to service.
- 2:15 - 3:15 **Panel Discussion: Behavioral Scorecard Development - The Latest Concepts - Cortera** - the panel will discuss the use of leading behavioral consumption data for best practices in portfolio management.
- 3:15 - 3:30 **Break**
- 3:30 - 4:45 **Fed Policy Creation and Economic Update - William Strauss, Sr Economist & Economic Adviser, Federal Reserve Bank of Chicago** - This session will review the current economic climate and provide an overview of the inner workings of the Federal Reserve, and specifically how policy is established.
- 5:00 - 6:00 **CRF Networking Reception**

Tuesday October 24

- 7:30 - 9:00 **Breakfast Buffet**
- 9:00 - 10:15 **GAP & FASB Standards: What’s Different and What You Need to Know - Steven Isberg, Ph.D., Credit Research Foundation** - Changes in the accounting policy standards can result in misconceptions of the balance sheet, income statement and accompanying support schedules . . . Now add in the difference in international standards and this can result in a skewed analysis and risk assessment. This session will debunk the mystery between the US and Europe, as well as provide updates on recent financial accounting standards.
- 10:15 - 10:30 **Break**
- 10:30 - 11:45 **“Behind Closed Doors” - What Role Does a Bankruptcy Judge Play - Rafael X. Zahraiddin, Elliott Greenleaf; Judge John K. Olsen; Denise Reyes, Acushnet Company; Kris Citera, ABC Supply Co** - The group will discuss what is on the minds of credit managers as it relates to the bankruptcy process and the overarching control of a Bankruptcy Judge - powers, responsibilities, nature of being in chambers and limited contact with the parties involved. This is an insider’s perspective around the entire process.
- 11:45 - 1:00 **LUNCH**
- 1:00 - 2:15 **Federal Reserve Payment Study - Guy Berg, Federal Reserve** - A review of the newly released findings from the Federal Reserve Payments Study. The triennial study is a unique and highly-respected research effort that provides a snapshot of non-cash retail payments usage in the US. The session will identify trends by comparing current data to historical data. Will it show that checks are finally on the way out in the B2B space? Takeaways from this session will include expanding your working knowledge of payments and learning about trends vital to savvy A/R and credit decision making.
- 2:15 - 3:15 **Awards and Recognitions**
- 3:15 - 4:15 **Insolvent Customers, Supplier Pacts and the Anti-trust Laws - Scott Blakeley, Blakeley LLP** - With the increase of bankruptcy activity in the retail space (and others) creditors continue to search for options for their use in the process. This session will review one of those options in the context of the legal framework of creditor and debtor rights.
- 4:15 - 5:15 **Small Business: Current Trends, Issues and Opportunities - Experian** - Small business continues to be the foundation for economic growth in the US and drives many aspects of the economy. This informative session will review current trends, issues and practices of today’s small business.

Wednesday October 25

- 7:30 - 9:00 **Continental Breakfast**
- 9:00 - Noon **CRF Open Forum** - Real time peer-to-peer exchange of needs and experiences.

Please refer to the CRF Events page for details on User Group Meetings being held in conjunction with the Forum