The template below is offered to enable you to present an ROI for attending the next in-person meeting of the Credit Research Foundation. ***It is just a template*** – YOU know your internal company dynamics best, so please modify this document as needed, particularly the section in red. Also attached is the detail you may need to outline the takeaways and justify your attendance.

Attending companies are listed on the Events page of the CRF website.

To \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:

In light of current considerations around tightening budgets, I’d like to highlight why attending the **CRF October Forum, Ft. Lauderdale FL,** represents a high-return, cost-justified investment — not discretionary travel.

This forum delivers direct, applicable strategies to:

* **Reduce credit risk and bad debt write-offs**
* **Improve productivity through process innovation**
* **Accelerate and safeguard incoming cash flow**
* **Benchmark practices against leading finance teams**
* **Includes professional and personal development**

The agenda is packed with **expert-led sessions**, and the final day’s **peer exchange** allows for real-time learning on what’s driving success — and failures — across industries. These insights can help navigate our own roadmap immediately.

**ROI Considerations:**

* Takeaways can be implemented to **strengthen cash flow** and **reduce exposure** — outcomes with direct financial impact.
* Networking and best practice sharing to reduce your reliance on trial and error — **speeding time to solution** and **cutting costs**.
* Meals and networking events are included, further offsetting costs.

In summary, this is a **strategic learning** opportunity that aligns with our financial goals. The insights gained will more than justify the cost of attendance and deliver value far beyond the forum itself.

**Optional**: Our estimated investment in my participation would be:

* Hotel (2 or 3 nights at $249/night + tax)                                               $XXX
* Airfare                                                                                                          $XXX
* Transportation                                                                                              $XX
* Meals $XX
* Registration fee                        $XXX

**$x,xxx**

I will assemble a post-conference report that includes an executive summary, key lessons, and recommendations for us to assess how to maximize the learnings.

I respectfully request your approval to attend this meeting.

**2025 October CRF Forum - Agenda with Takeaways**

The 2025 October Forum offers educational sessions curated by industry experts, several opportunities for peer group networking, best practice discussions and dedicated time for the exchange of new and emerging trends/processes.

This three-day event is focused on providing **executive level education** and plenty of opportunities to **network with fellow credit executives** to discuss challenges and best practices.

**Agenda Highlights:**

* A compelling exploration of **Finding Ways to Lead**, by the Author of **White Blaze**
* An expert led **Governance and Oversight** session from Bectran
* In-depth analysis on lessons learned from **Audit and Compliance** on shoring up credit risk in a volatile economy from Jefferson Wells
* A best practices session on **Strategic Leadership in Credit & Finance**
* A compelling review of **The Role of Unsecured Creditor Committees and Unlocking Value During and After Bankruptcy**
* **A Practical Guide to Electronic Signatures to Ensure Legal Compliance**
* **SAP S4Hanna, Service Provider Breakout Groups and the Building Products Best Practices Group**

Thank you for your consideration.

Name

Contact Detail