



**Mid-Atlantic AFP**  
ASSOCIATION FOR FINANCIAL PROFESSIONALS



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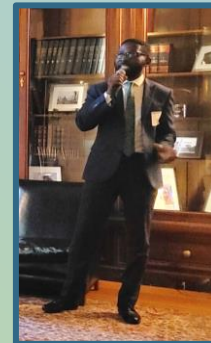
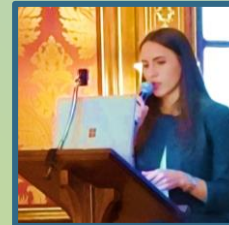
# Treasury & Spring Financial Forum

The Engineer's Club of Baltimore

April 26, 2023 | 8:00 AM to 4:00 PM

Registration / Coffee: 7:15 AM | Kickoff: 8:00 AM | First Session: 8:15 AM  
Lunch: 11:30 AM | Conference Conclusion: 4:00 PM

*Online  
Option  
Available*



*Approved for up to 7.5 CTP and FP&A Recertification Credits by the Association for Financial Professionals*



# Treasury & Financial Forum Schedule



<b>8:00</b>	<b>Welcome, MAAFP Overview, and Kick off</b>	
<b>8:15</b>	<b>Worst Case Scenarios When Treasury Fails</b> <ul style="list-style-type: none"><li>• Johnnie Watson, Johns Hopkins University</li><li>• Laurel Egan Kenny, Turningpoint Communications</li></ul>	It's not what happens to you; it's how you deal with it. In fireside chat format, a treasury leader will inform the audience about the importance of the treasury function within critical institutions, and what happens if/when treasury teams are unable to perform their duties due to internal and external disasters. Continuity plans, processes and procedures, and prompt remediation with help from allies will also be addressed.
<b>9:15</b>	<b>International Treasury Concerns for 2023 Corporate Treasury &amp; Bank Perspectives</b> <ul style="list-style-type: none"><li>• Ayodeji Omoogun, Standard Chartered Bank</li><li>• Lora Tutman, Johns Hopkins University</li><li>• Steve Perry, Catholic Relief Services</li><li>• Michael Powers, Abt Associates, Inc.</li><li>• Kaliopi Provencher, Kaliopi Consulting</li></ul>	International corporations and not-for-profits continue to face challenges doing business abroad. Their banking partners are being forced to make changes to their business models, including exiting certain markets. This session will focus on the challenges associated with KYC compliance, market shifts by the banks, AML requirements, PII challenges, and solutions being devised by all parties to deliver services to their clients.
<b>10:30</b>	<b>Hybrid Workplace/Workforce: Is it "Working" for employers, employees?</b> <ul style="list-style-type: none"><li>• John Mitton, RedThread</li></ul>	Employers and employees have settled on a hybrid work environment as the best-case scenario / compromise to deliver the best of both worlds: remote work and in-person interaction, collaboration and mentoring - together with convenience, balance and employee engagement. With retrospection, presenter will discuss the bottom line for profitability, productivity, corporate headquarters, work schedules, including a four-day work week.
<b>11:30</b>	<b>Networking Buffet Lunch</b>	
<b>12:30</b>	<b>Update on Blockchain, Cryptocurrency / FTX Exchange / Downstream implications of Crypto assets on banking and treasury</b> <ul style="list-style-type: none"><li>• Lynne Marlor, Boston Blockchain Association</li></ul>	A treasury management leader of 30 years turned digital asset/ ledger strategist will provide an overview of blockchain technology and use cases for digital ledgers in industry today. She will also discuss the latest on cryptocurrency and other digital assets, including NFTs, and review how organizations are "investing." Finally, she will discuss the implications of - and fallout from the FTX Exchange and what the SVB collapse means for digital asset companies.
<b>1:30</b>	<b>Economic Update</b> <ul style="list-style-type: none"><li>• Shannon Seery, Wells Fargo</li></ul>	A US economist will provide an overview of the current U.S. and global economies. She will provide context around rising interest rates, inflation, geo-political issues and their impact on the US. She will also address recession indicators, deglobalization trends and the impact of our aging population, technology, stimulus packages.
<b>2:30</b>	<b>FedNow Payments System Update</b> <ul style="list-style-type: none"><li>• John Sappington</li><li>• Della Tate, Federal Reserve Bank</li></ul>	Federal Reserve leaders will provide an update on the FedNow Service launch in July. Presenters will discuss execution plans. Early adopting financial institutions, large processors, and U.S. Treasury will pilot core clearing and settlement functionality. Additional features and enhancements will be added to continue supporting safety, resiliency and innovation.
<b>3:45</b>	<b>Wrap Up</b>	

# Speaker Biographies



**Johnnie Watson, III**  
*Associate VP and  
Deputy Treasurer  
Johns Hopkins  
University*

Johnnie is Associate VP and Deputy Treasurer at Johns Hopkins University, where he oversees the University's external debt, central bank, cash and short-term investment pool, daily cash, liquidity and forecasting, and manages external relationships with banks and rating agencies. Previously, Johnnie served as Treasurer for City of Atlanta. Johnnie holds a Bachelor of Science degree from Georgia Institute of Technology and an MBA from University of Chicago.



**Ayodeji "Ayo"  
Omoogun**  
*Director,  
Global Relationship  
Manager, Standard  
Chartered Bank*

Ayo is Director and Global Relationship Manager with Standard Chartered Bank, covering clients of Public Sector and Development Organizations. He joined Standard Chartered Bank in 2013 in Nigeria and, over this period, worked in Dubai and London before moving to New York, where he is currently based. Ayo works closely with various International and humanitarian development organizations, assisting these organizations in their treasury activities in emerging markets and developing economies. Before joining Standard Chartered Bank, Ayo worked for United Bank for Africa (UBA) in Lagos, Nigeria.



**Lora Tutman**  
*Director of Treasury  
Operations  
Johns Hopkins  
University*

Lora Tutman is Director of Treasury Operations for Johns Hopkins University, responsible for domestic and international banking. With over 14 years of experience in the international arena, Lora manages 150 plus foreign bank accounts, in 45 countries. Lora also serves as an advisor on the Johns Hopkins University International Team, consisting of Global HR, Office of General Counsel/Compliance, and International Tax. Lora holds a B.S. in Finance from Towson State University and an M.B.A. from Morgan State University.



**Steve Perry**  
*Global Treasurer  
Catholic Relief  
Services*

Directs global treasury operations at HQ and in over 100 developing programming countries. Responsible for establishing agency wide treasury policies and procedures. Supervises a Treasury staff of four which is responsible for liquidity, banking with 300 international accounts and 30+ global bank relationships. Oversees insurance and foreign currency risks and conversions in 40+ major and exotic currencies. Enforces security and compliance with federal and international regulations on terrorist vetting and OFAC. Steve holds an MS, a CTP from AFP and CPA.



**Michael Powers**  
*Finance Director  
Abt Associates, Inc.*

With over 15-years' experience as a treasury & risk management practitioner dealing with risk issues in over 60 countries (mostly in the international development sector), Michael leads global entity management, treasury, and risk and crisis management for Abt Associates, interfacing with C-suite executives and supporting 225+ bank accounts. Previously, Michael served for over 10 years at Verizon and other government contractors in progressive finance and IT positions, including onsite international financial system conversions, preparing him to deal with a myriad of risk issues (particularly cyber and clinical trials) at Abt. Outside of work, Michael is Board Treasurer of the Alewife TMA, and emeritus member of the FP&A Global Advisory Board at AFP (Association for Finance Professionals).

# Speaker Biographies



**John Mitton**  
*Vice President,  
Audio Visual  
Group; CTO  
Red Thread*

John is Vice President of Audio Visual Group / CTO at Red Thread. John is committed to integrating collaboration technology seamlessly into workspaces. He is skilled in Budgeting, Sales, Customer Relationship Management (CRM), and Sales Management. He has a strong media and communication professional background and holds a Bachelor of Business Administration at The University of Massachusetts Boston.



**Lynne Marlor**  
*Chair, Boston  
Blockchain  
Association;  
Co-Founder,  
Women in Digital  
Assets Forum*

Lynne is a frequent global speaker, investor and thought leader in the blockchain and digital assets ecosystem. Lynne helps clients optimize operations through treasury management and driving adoption of Blockchain, Digital Assets, Brand Creation, Innovation and scalable digitization. Previously, Lynne was Managing Director/Head of Treasury Services at BNYMellon. She is passionate about giving back and uplifting others.



**Shannon Seery**  
*Vice President,  
Economist  
Wells Fargo*

Shannon is an economist for Wells Fargo's Corporate and Investment Bank. She provides analysis on the U.S. macro economy, with a special focus on international trade, corporate profits, and consumer spending. She regularly contributes to economic commentary and shared in major media. Shannon graduated St. John's University, NY B.S. in economics.



**John Sappington**  
*Senior Account  
Executive,  
Federal Reserve*

John Sappington is a Senior Relationship Manager with the Federal Reserve Bank of Richmond. John assists financial institutions in the use of Federal Reserve Financial Services to include payment clearing and connectivity, as well as related risk and informational services. His work within the Federal Reserve System began in 1991 and he has held various managerial and program assignments. John is a graduate of the University of North Carolina at Charlotte and the North Carolina Bankers School Program. John and his wife Donna reside in Matthews, North Carolina.

## Moderators:



**"Worst Case Scenarios When Treasury Fails"**  
**Laurel Egan Kenny**  
*President, Turningpoint  
Communications*



**"International Treasury Concerns for 2023 Corporate Treasury & Bank Perspectives"**  
**Kaliopi Provencher**  
*President, Kaliopi Consulting*



**"FedNow Payments System Update"**  
**Della M. Tate, AAP, CTP**  
*Program Director  
Retail Payments Product Management  
Federal Reserve Financial Services*

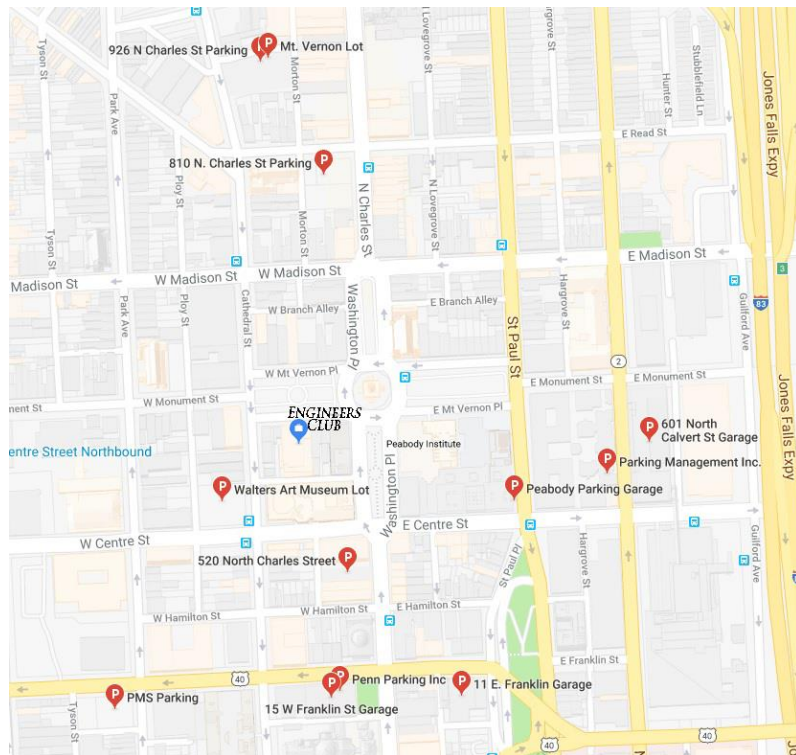






**Logistics**

- Parking is available in designated lots within walking distance from The Engineer’s Club. See map.
- Coffee and Tea will be served as attendees arrive beginning at 7:30 AM and will be replenished throughout the day.
- Conference Kickoff will be at 8:00 AM and end by 4:30 PM. Lunch served at 11:30 AM, will feature a diverse hot luncheon buffet, with several choices of entrée, soup and salad to accommodate most dietary needs / restrictions.
- Attendees will be provided with all-in AFP recertification approval certificates. Eligible attendees will self report / certify under the honor system at a rate of 1.2 credits per hour.
- Virtual Option is available live only. Recording is not eligible for AFP recertification credits.



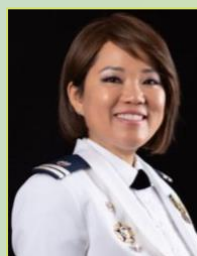
**2022-2023  
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**Michelle Vanschooris**  
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Secretary

**Diane Mann**  
Treasurer  
(Not Pictured)



**Jane Padgett**  
Past President  
At Large Member



**Jennifer Erickson**  
At Large