

WISCONSIN 2022 ANNUAL MEETING

Holiday Inn Pewaukee
N14 W24120 Tower Place
Pewaukee, WI 53072

TUESDAY
JUNE 14

Registration Deadline | June 1



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NACM | **CONNECT**
National Association of Credit Management | *Driving results*

3005 Tollview Drive
Rolling Meadows, IL 60008



9:15 – 9:30 A.M.

OPENING REMARKS

Phil Lattanzio, CCE, President & COO, NACM Connect

9:30 – 10:30 A.M.

**HOW TO MAKE A SUCCESSFUL CREDIT DECISION
BASED ON LIMITED CREDIT INFORMATION**

Kevin Stinner, CCE, CCRA, Simplot AB Retail Sub, Inc.

Have you ever had a credit application that was barely filled out, or a customer financial statement that was written on a napkin? This session will review how to make a good credit decision when customer credit information is restricted or limited. We will review how to gather information, use tools that are readily available to you, and to make good quality decisions using the 5 C's of Credit. We will incorporate the use of free tools to research customers, use little know information in reports including D&B, NACM reports, etc., and how to get information out of customers that they would not normally provide a trade creditor.

10:45 A.M. – 12:00 P.M.

ECONOMIC UPDATE

Chris Kuehl, Armada Intelligence

NACM Connect favorite Chris Kuehl will be sharing his updates on the economy with us. Where are we and where are we headed? What is the outlook for both the domestic and international economy? Always informative, Kuehl will deliver his breakdown in his usual, easy for laymen to understand, style.

1:00 – 2:00 P.M.

**MERGERS & ACQUISITIONS AND THE IMPACTS ON
YOUR CREDIT DEPARTMENT**

Thomas Fawkes and Brian Jackiw, Tucker Ellis LLC

Corporate combinations can create unique challenges for a credit department, from a legal, cultural, and human resources perspective. During this presentation, our panelists will discuss the impacts on a credit department resulting from both a merger/acquisition involving your company, as well as a transaction involving one or more of your customers. Among other things, the following topics will be addressed: (i) harmonizing credit department contracts and documents, as well as credit policies; (ii) ensuring that credit protections, including security interests and guarantees, are preserved and maintained post-combination; (iii) preserving culture in a credit department that has just absorbed another credit department; and (iv) using a merger transaction as an opportunity to improve the credit function.

2:15 – 3:15 P.M.

THE CARE AND FEEDING OF DELINQUENT ACCOUNTS

Barbara Grosskreutz, CBA, Rockline Industries, Inc.; Joseph Lange, CCE, ICCE, CCRA, Brenntag North America, Inc.

Does your company have a structured collection policy? Do you engage Sales for assistance? How do you use credit holds and credit limits? What other tactics do you employ to collect delinquent accounts, particularly when your customer has cut off communication. Share your thoughts and practices in this open roundtable discussion.

3:30 – 5:00 P.M.

BUSINESS MEETING AND NETWORKING EVENT

If you want to register for the Business Meeting **only** please contact Janet Rapp at janet.raap@nacmconnect.org.



REGISTRATION INFORMATION

Registration Deadline | June 1

DATE/TIME

June 14 | 9 AM – 5 PM CST

PRICING

\$199 members

(Two coupons per company are valid)

\$398 nonmembers

LOCATION

Holiday Inn Pewaukee
N14 W24120 Tower Place
Pewaukee, WI 53072

**ALL REGISTRATIONS ARE TAKEN ONLINE AT
WWW.NACMCONNECT.ORG**

While registering online, you will have the opportunity to choose your payment method. We are happy to take a credit card online or invoice you. You will also have the opportunity to apply coupons as allowed.

Cancellation Policy: Cancellations must be received in writing, via email or mail no later than two weeks prior to the meeting date to qualify for a full refund. Cancellations received later than two weeks prior to the meeting date DO NOT qualify for a refund of registration fees. Substitutions are allowed. Sorry, phone cancellations cannot be honored. If you have any questions, please email info@nacmconnect.org.

QUESTIONS? Please contact Lillian Novak at lillian.novak@nacmconnect.org

CEU points and CCE recertification points are available for all educational sessions.

