

# 2024 OMAHA ANNUAL MEETING

IT FEELS GOOD TO RECONNECT...



TUESDAY  
MAY 21

**REGISTRATION DEADLINE:**  
May 14

**START AT**  
9:00 AM

Join us to learn and network with your peers and leaders in the commercial credit profession.

SPEAKERS



**Thomas Fawkes**  
Partner  
Tucker Ellis LLP



**Brian Jackiw**  
Partner  
Tucker Ellis LLP



**James Brown**  
Founder and Owner  
BKwire.com



**Mary Moore, CBA**  
Director of Credit Services  
Southern Carlson



**Denise Kephart, CBA**  
Credit Manager  
Lozier



**Chris Kuehl**  
Armada Corporation  
Intelligence

## THE STATE OF CREDIT AND COLLECTIONS MEETING AGENDA

### IN-PERSON

Courtyard Omaha Downtown/Old Market Area  
101 S 10th St,  
Omaha, NE 68102

### PRICING

\$179 members

*(Two coupons per company are valid)*

\$358 nonmembers

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**QUESTIONS?** Please contact Lillian Novak at  
[lillian.novak@nacmconnect.org](mailto:lillian.novak@nacmconnect.org)

# TUESDAY MAY 21

9 A.M. — 5 P.M. CDT

**Registration Deadline | May 14**

**9:15 A.M. - 9:30 A.M.**

**OPENING REMARKS**

*Phil Lattanzio, CCE, President & COO  
NACM Connect*

**9:30 A.M. – 10:30 A.M.**

**AI and the Credit Department**

*Thomas Fawkes and Brian Jackiw, Partners  
Tucker Ellis LLP*

While artificial intelligence (AI) has been around for decades, there have been enormous advances in the technology over the past several years that have now made it viable for business applications, including credit. AI stands to transform the credit industry as we know it, and the benefits of AI are apparent: automation of customer onboarding and underwriting, predictive analytics, data management, collections, and forecasting is now possible, which could in the future substantially expedite decision making and reduce credit department labor costs. There are, however, substantial risks: the technology is still developing, is still prone to errors, and cannot – at least at this time – navigate around unforeseen events and replace the experience and judgment of tenured (human) credit professionals. During this presentation, we will discuss the benefits and opportunities of integrating AI into your company’s credit function, along with the legal and business risks and challenges associated with the current AI technology.

**10:45 A.M.– 12:00 P.M.**

**The Impact of Bankruptcies - Deeper than You Think**

*James Brown, Founder and Owner, BKwire.com*

In the year 2023, more than 18,000 businesses filed for bankruptcy, which affected over 400,000 creditors. Such bankruptcy filings can have significant impacts on your company, and it’s crucial to be aware of the potential risks. If one of your customers files for bankruptcy, it can negatively affect your business, and the impact can even extend beyond that if your customer’s customer also files for bankruptcy. In this session, we will delve into this topic in greater detail and learn how to use data to uncover the hidden

effects of bankruptcy filings on your business. It’s important to take proactive measures to safeguard your company and arm yourself with the knowledge you need to mitigate the risks and protect your business in the long run.

**12:00 P.M. – 1:00 P.M.**

**LUNCH**

**1:00 P.M. – 2:00 P.M. How to Make a Sound Credit Decision,**

*Mary Moore, CBA, Director of Credit Services, Southern Carlson, Denise Kephart, CBA, Credit Manager, Lozier*

In an interactive workshop, random scenarios for credit requests will be worked out by the attendees with the assistance of the panel. Join us for what promises to be a fun session that will test what you know about credit decisions while learning new ways to assess your customers’ requests.

**2:15 P.M – 3:30 P.M. Economic Update**

*Chris Kuehl, Armada Corporate Intelligence*

Once again we will be ending our day of learning with Chris Kuehl’s insights into the current state of the economy. Always a don’t miss, get an idea of where the economy may be heading in the months ahead.

**3:30 P.M – 5:00 P.M. BUSINESS MEETING & RECEPTION**

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**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.

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