



The Credit Tour 2025

connected.

WISCONSIN

April 9

SPOTLIGHT SPONSOR



Meeting Agenda

Holiday Inn
 N14 W24140 Tower Place
 Pewaukee, WI 53072

PRICING:

\$199 members
(Two coupons per company are valid)
 \$398 nonmembers

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

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PLATINUM



GOLD



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BRONZE



Wednesday

April 9th, 9:00 a.m. – 5:00 p.m. CT

9:00 a.m. Registration and Coffee Service

9:30 a.m. – 10:30 a.m.

Credit Application Fraud: Some of the Signs, Preventive Steps & Remedies for the Savvy Vendor,
Jason Torf, Partner, Tucker Ellis

A key role of the credit department is to mitigate and prevent losses. That job becomes increasingly difficult when bad actors engage in unscrupulous conduct, such as by submitting a fraudulent credit application to induce your company to ship goods with no intention to pay for them. In this session, you will learn to identify some of the telltale signs of potential fraud and how to engage in extra diligence to save your company from losses. You will also hear about available remedies in the event goods are shipped and the fraudsters don't pay you. Don't let the bad guys win – learn about how to beat the fraudsters before they beat you!

10:45 a.m. – 12:00 p.m.

Downsizing Terms Roundtable,
Barbara Grosskreutz, CBA, Rockline Industries, and Matt Mezger, CBA, Uline

In recent years there have been demands from customers to grant longer terms of payment. In cases where this has been allowed, many credit professionals are now looking to take back the reins and get customers back to their "normal" terms. But how do you accomplish this without potentially offending your customer? In this open roundtable, we will share examples of strategies, successes (and failures). If you find yourself in this situation, here's a place you can pick up a tip or two from your fellow credit managers.

12:00 p.m. – 12:45 p.m. Lunch

12:45 p.m. – 1:00 p.m. **NACM Connect News and Updates**

1:00 p.m. – 2:00 p.m.

Economic Update,
Brian Jacobsen, Chief Economist, Annex Wealth Management

With the new administration things are changing fast, and many of the changes have a direct impact on the economy. Join us for an insightful and engaging session as we delve into the current state of the economy and its implications for the commercial credit landscape.

2:15 p.m. – 3:30 p.m.

Regulations and Laws To Stay Compliant and Keep Costs Low: Payment Processing,
Matt Fluegge, VP of Sales and Strategic Partnerships, United Transactions

Many trade creditors have implemented various payment processing strategies to improve DSO, reduce costs, and improve operational efficiency, but not understanding payment processing requirements is a pitfall of many merchants. This presentation will discuss the regulations and laws regarding credit card surcharging, ACH / Electronic Check processing, and alternative payment strategies. Using examples of fellow NACM Members, this session will also discuss how to implement these strategies in a compliant manner to protect your company and to reduce risk and cost.

Reception at 3:30 p.m. Thunder Bay Grille