

Speaker Biographies

Credit Application Fraud: Some of the Signs, Preventive Steps & Remedies for the Savvy Vendor

Jason Torf, Partner, Tucker Ellis

Jason Torf is a Partner at the law firm of Tucker Ellis in Chicago. Jason helps companies maximize their recovery and minimize their risk when dealing with financially distressed customers, suppliers and other related parties. Jason has represented virtually all parties in bankruptcy and other financial distress situations including trade creditors, creditors' committees, secured creditors and many more. Jason regularly speaks for NACM and CFDD as well as various industry credit groups. He received his BS in Finance from the University of Illinois Urbana-Champaign and his JD in 1998 from the U of I College of Law.

Downsizing Terms Roundtable

Barbara Grosskreutz, CBA, Rockline Industries

Barbara is in Credit/Collections at Rockline Industries. From 2000-2002, she worked at Pitney Bowes in the Credit Department. She went to Fox Valley Technical College. Barbara also has her CBA designation from the National Association of Credit Management.

Matt Mezger, CBA, CCRA, Uline

Matt Mezger, CBA, CCRA, is a Team Lead at Uline Inc and has worked in Credit for 8 years. He obtained his CCRA in April 2021 and his CBA in November of 2022. He was a previous participant of the Emerging Leaders Group where he was a member of the Scholarship committee and received the 2023 NACM Emerging Leadership award from NACM National. Currently he is a member of the Education committee. Matt graduated from Northeastern Illinois with a degree in Economics in 2015.

At Uline, he leads a team responsible for reviewing Uline's highest risk customers and presents to executive management on a bi-weekly basis. He works with management to create new efficiencies for the department and helps develop analytical skills of team members.

Economic Update

Brian Jacobsen, Chief Economist, Annex Wealth Management

Brian Jacobsen is Chief Economist of Annex Wealth Management. As Chief Economist, Brian provides insight and leadership to Annex's clients and its Investment Committee, which guides client portfolio construction and investment philosophy. An accomplished writer and speaker, Brian's perspective and expertise have been featured nationally on networks like CNBC and Bloomberg. He has also appeared on Annex's "Money Talk" weekly radio program in the past.

Brian scored an academic hat-trick by attending the big three universities in Wisconsin, earning a Bachelor's Degree in Finance from the University of Wisconsin-Madison, a Ph.D. in Economics from the University of Wisconsin-Milwaukee, and a law degree from Marquette University Law School. Brian has earned the right to use the Chartered Financial Analyst (CFA®), the Certified Financial Planner (CFP®), the Chartered Alternative Investment Analyst (CAIA®), and the Certified Business Economist (CBE®) designations. Before working at Annex Wealth Management, Brian worked as a Senior Investment Strategist and as a Chief Portfolio Strategist. He was also an associate professor at Wisconsin Lutheran College. In his spare time, Brian is an Instructor of Practice at Marquette University.

Regulations and Laws To Stay Compliant and Keep Costs Low: Payment Processing

Matt Fluegge, VP of Sales and Strategic Partnerships, United Tranzactions

Matt Fluegge is the Vice President of Sales and Strategic Partnerships with United TranzActions (UTA), and prior to that he was an Executive Consultant with Worldpay. UTA is the nation's largest check and ACH guarantee payments provider, and Worldpay is the nation's 2nd largest credit card processor.

Matt is a 23-year industry veteran with considerable payment processing and credit card surcharging expertise. He has a Business Administration degree in Finance. In addition to being a national presenter on payment processing topics, Matt works one-on-one with companies to provide payment processing services that reduce risk and costs and improve security and operational efficiency.

UTA and Worldpay have integrated their solutions and have been the NACM Affiliate's preferred payment processing partners for nearly 3 decades.