



WE'RE OFF TO THE CREDIT RACES!

2026 REGIONAL MEETINGS CLEVELAND: ROCK & ROLL RACER

THURSDAY, MAY 7th, 2026

Meeting Agenda

Courtyard by Marriott Cleveland
Independence
5051 W Creek Road
Independence, OH 44131

REGISTRATION DEADLINE:
THURSDAY, APRIL 30TH, 2026

PRICING:
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CLEVELAND: ROCK & ROLL RACER



POST TIME: Thursday, May 7th, 9:00 a.m. - 3:30 p.m. ET

9:00 a.m. – 9:30 a.m. Registration

9:30 a.m. – 9:45 a.m. Opening Remarks – Frank Schetski

9:45 a.m. – 10:45 a.m. Heroes and Horrors: Triumphs and Tragedies Unveiled (Navigating Credit through the Eyes of the Court)

Wanda Borges, Esq., Borges & Associates LLC

This specialized educational program has been updated and explores real-world cases, showcasing both the triumphs and challenges faced by trade credit grantors. Emerging Leaders in the credit world as well as seasoned veterans will gain valuable insights, strategies, and best practices to make informed decisions and mitigate risks in the world of trade credit as we delve into the world of lawsuits in state court and federal courts (including bankruptcy courts). Attendees will be shown how creditors and attorneys stepped up to the plate, turning the tide of seemingly unwinnable situations into success stories. Examples will be provided of how accurate terms and conditions and then using those terms and conditions can assist the trade creditor in recovering a debt. Cases will be discussed where a seemingly simple error can cause the loss of thousands of dollars for the creditor. Riveting stories of triumph and tragedy will keep the attendees engaged from start to finish.

10:45 a.m. – 11:00 a.m. – Break

11:00 a.m. – 12:00 p.m. Nuts & Bolts of Notices, Lien Wavers, and Mechanics Liens: Reduce DSO and Protect Your Bottom Line
Marla Zurlo, Key Account Executive NCS Credit

Construction credit comes with unique challenges, including long payment cycles, thin margins, and the ever-present risk of non-payment. This session breaks down the foundational tools every construction

credit professional should know, covering the notice, lien waiver, and mechanic's lien process from preliminary notices through foreclosure. Attendees will leave with a clearer understanding of how to move from unsecured to secured, become a payment priority, and leverage technology to manage their construction portfolio more efficiently.

12:00 p.m. – 1:00 p.m. Lunch

1:00 p.m. – 1:15 p.m. NACM Connect Updates – Phil Lattanzio

1:15 p.m. – 2:15 p.m.

The 5 C's of Credit in Review
Caroline Perkins, CCE, Credit Manager, Mickey Thompson Performance Tires

Character, Capacity, Capital, Collateral, Conditions. These pillars set the fundamental framework for evaluating creditworthiness and mitigating risk in credit decisions. Whether you are new to credit or a seasoned professional, this comprehensive overview will equip you with the tools you need to navigate the complexities of credit evaluation effectively.

2:15 p.m. – 2:30 p.m. – Break

2:30 p.m. – 3:30 p.m. Guarding Against Deception
Amy Cook, CCE, Retired, Credit Manager

Payment fraud continues to be a major problem for companies. Knowing how to identify the latest fraud schemes, recognize emerging threats and implement effective fraud mitigation strategies is critical to protecting your business' bottom line. This session will cover essential tips and best practices to help you fight fraud. Don't miss this opportunity to gain critical knowledge and protect your organization from the growing threat of business-to-business (B2B) fraud!