



2022 – 2023 VIRTUAL PROFESSIONAL DEVELOPMENT PROGRAM SCHEDULE

DATES, TIMES & PLATFORM	TOPICS & FEATURED SPEAKERS
SEPTEMBER 2022 SESSION	
SEPTEMBER 7, 2022 Time: 12:00 PM – 1:00 PM Zoom Virtual Event	Topic: ESG: Evolution & Opportunities Speaker: John Friedman Managing Director, ESG & Sustainability Practice Grant Thornton LLP
OCTOBER 2022 SESSIONS	
OCTOBER 12, 2022 Time: 12:00 PM – 1:00 PM Zoom Virtual Event	Topic: Bank Account Integration & Process Automation Speakers: Meghann Crowe Senior Product Manager BMO & Nicole Welch Senior Treasury Consultant BMO
NOVEMBER 2022 SESSION	
NOVEMBER 9, 2022 Time: 12:00 PM – 1:00 PM Zoom Virtual Event	Topic: Doing Things Right In These Challenging Times Speaker: Tim Lietz National Practice Leader – Risk & Compliance Jefferson Wells
JANUARY 2023 SESSIONS	
JANUARY 11, 2023 Time: 12:00 PM – 1:00 PM Zoom Virtual Event	Topic: Quick Fixes & Upgrades for your 401(k)/403(b) Retirement Plan Speakers: Kevin Skow Vice President – Retirement Plan Consultant Francis Investment Counsel & Joe Topp Vice President – Investment Consulting Services Francis Investment Counsel
JANUARY 12, 2023 Time: 12:00 PM – 1:00 PM Zoom Virtual Event	Topic: 2023 Benefits, Legislative, & Financial Trends Speakers: Josh Bergman Area Vice President Gallagher Benefit Services & Lisa Metcalf Area Executive Vice President Gallagher Insurance

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FEBRUARY 2023 SESSION	
<p>FEBRUARY 8, 2023 Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p>Topic: Intellectual Property: The Unprotected Corporate Asset</p> <p>Speakers: Chris Rafferty Global Specialty. Product Leader Intellectual Property Solutions Aon & Anastasia Vorobiova Senior Broker Intellectual Property Solutions Aon</p>
MARCH 2023 SESSIONS	
<p>MARCH 8, 2023 Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p>Topic: Supporting Business Owners through their Transition – Planned & Unplanned Panel Discussion</p> <p>Panelists: Lisa Horn Principal CLA, Brian Kleis Principal CLA & Samantha Metcalf Managing Principal, Private Industries CLA</p>
<p>MARCH 9, 2023 Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p>Topic: 2023 Hiring & Compensation Trends in Finance</p> <p>Speaker: Jim Jeffers Regional Director Robert Half</p>
APRIL 2023 SESSION	
<p>APRIL 12, 2023 Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p>Topic: The Top Cybersecurity Weaknesses Most Organizations Face</p> <p>Speaker: Jeremiah School Vice President of Channel Operations / Partner, Impact Networking</p>