MN AFP
Minnesota Association for Financial Professionals

Speakers & Sessions

Annual Conference
May 5, 2026 · Saint Paul RiverCentre
Engage · Enhance · Explore

Time	Session Title	Speaker/Organization	Description
7:30 AM – 8:00 AM	*Registration and Breakfast*		
8:00 AM – 9:00 AM	**AI in Treasury: Promise Meets Reality – Driving Adoption Without Burning Out Your Team**	Karen Gilhooly	This engaging, interactive session will energize attendees and provide practical tools treasury professionals can apply immediately. Participants will explore how treasury teams can align technology initiatives with human capacity, strengthen execution, and improve performance in complex environments. Attendees will leave with actionable strategies to drive meaningful AI adoption without overwhelming their teams.
9:30 AM – 10:20 AM	**Taking Global Treasurers from Tactical to Strategic**	Jordan Coakley, J.P. Morgan Eric Bauer, J.P. Morgan Jon Stark, J.P. Morgan	Explore how leading treasurers shift from day-to-day execution to enterprise strategy. We'll unpack best practices to: achieve real-time visibility and control, leverage technology (APIs, TMS/ERP integration, analytics, automation), unlock trapped cash and navigate cross-border constraints, rationalize accounts and build purpose-driven liquidity structures aligned to risk, cost, and growth. Leave with practical frameworks and examples you can apply immediately.
9:30 AM – 10:20 AM	**From Compliance to Intelligence: Harnessing Rich ISO 20022 Payment Data for Treasury Impact**	Nasreen Quibria, PNC Bank Jeff Ferguson, Axeltrees	As the industry moves beyond ISO 20022 adoption, the focus is shifting from compliance to innovation. This session will explore how ISO native payment data is powering the next generation of treasury transformation. Speakers will discuss how the combination of structured data, AI, and advanced analytics enables real-time insights, reduces operational friction, strengthens forecasting accuracy, and empowers treasury teams to make faster, more confident decisions.
9:30 AM – 10:20 AM	**The 2026 Crosscurrents Shaping the Yield Curve**	Dimitri Delis, Piper Sandler	Markets are pricing a shallow easing path, but 2026 may demand deeper rate cuts. We outline the forces shaping that outlook—disinflation driven by housing lags, limited tariff pass-through, emerging labor-market cracks, and a fading wealth effect—and what they imply for rates and volatility. We also examine how fiscal and monetary policy choices will support a more sustainable fiscal trajectory, while highlighting key market risks (AI overinvestment, private lending growth) and the signposts to monitor for planning and risk decisions.

Time	Session Title	Speaker/Organization	Description
9:30 AM – 10:20 AM	**Investment Management in the Age of Artificial Intelligence**	Floyd Simpson III, CFA, CAIA, CFP U.S. Bancorp Asset Management	Artificial intelligence is reshaping how finance and treasury leaders analyze risks, interpret markets, and make investment decisions. This session explores the accelerating adoption of AI across investment management—from machine learning–driven research and predictive models to real world case studies and operational applications. Attendees will gain practical insight into where AI creates value today, the risks and limitations to watch, and how leading organizations are preparing their teams for an AI enabled future.
9:30 AM – 10:20 AM	**Uncovering Hidden Yield and Working Capital Through Payments**	Tamir Shafer, Redbridge	This session explores how Procurement, Accounts Payable, and Treasury can unlock hidden yield and improve working capital through better collaboration. In many organizations, these teams operate in silos, leaving value untapped across the payment process. We'll review each team's core responsibilities, outline the ideal AP workflow, and identify where working capital opportunities may be hidden within your supply chain.
10:20 AM – 10:30 AM	*Short Break*		
10:30 AM – 11:20 AM	**Transforming Treasury Through ERP & TMS Integration**	Carlos Conde, Elire Logan Wacker, FIS	Treasury teams are accelerating digital transformation by integrating ERP platforms with Treasury Management Systems to create real-time, automated liquidity and risk workflows. This session outlines the technical foundations of ERP-TMS integration, including API connectivity, ISO 20022 payment standardization, automated accounting interfaces, and centralized bank connectivity models.
10:30 AM – 11:20 AM	**What's New in ACH Payments**	Debbie Barr, Nacha	Led by record-breaking volume and value last year, and driven by innovation and industry demand, the ACH Network continues to experience unprecedented growth and evolution. Same Day ACH is stronger than ever, processing nearly 1.5 billion payments in 2025, over 16% more than in 2024. Attendees will learn what's new at Nacha, how to be prepared for new rules coming in 2026 and beyond, as well as what could be on the ACH horizon. Come explore great ways to make the ACH Network work for you.

Time	Session Title	Speaker/Organization	Description
10:30 AM – 11:20 AM	**Partnering Between Fintechs and FIs for Success**	Sara Hentges, UMACHA	As more fintechs emerge in the payments industry, FIs have the opportunity to expand their offerings by cultivating meaningful vendor partnerships. As with all third-party relationships, appropriate oversight and vendor management are crucial, as well as seamlessly passing fintech products through to consumers. Students will learn how to set appropriate expectations with your partnering fintechs around rules enforcement, requirements and responsibilities. We'll touch on the 4-letter word 'Regulatory' too!
10:30 AM – 11:20 AM	**IRS Criminal Investigation**	Isaac Bravo, IRS Criminal Investigation Ryan Ogden, IRS Criminal Investigation	Our agenda will go over IRS CI as an organization, the Minnesota SAR Review Team, and Case Studies of past adjudicated cases.
10:30 AM – 11:20 AM	**5 Key Trends in Payments**	Carrie Staut, Global Payments	In today's fast-changing world, payments are more than transactions—they're a powerful driver of innovation, customer experience, and business growth. This dynamic session explores the five key trends reshaping the future of payments, including real-time payments, artificial intelligence, embedded finance, digital currencies, and the evolving consumer mindset. Discover what these shifts mean for your organization and your career, and gain insight into the opportunities they create for leadership, innovation, and inclusion. Walk away inspired and equipped to not just adapt to change—but to lead it.
11:20 AM – 1:00 PM	**Lunch and Keynote Speaker – Jason Schenker**	Jason Schenker	This keynote session will provide forward-looking insights to help treasury and finance professionals prepare for what lies ahead. Attendees will gain perspective on economic trends, emerging risks, and opportunities shaping the future of business and finance. The session will offer practical takeaways to support strategic planning and decision making in an evolving environment.

Time	Session Title	Speaker/Organization	Description
1:00 PM – 1:50 PM	**Staying Ahead of the Nacha Rules**	Sara Hentges, UMACHA	Ten Nacha Operating Rules have been approved but are not yet implemented. Do you know what they require and whether your institution will be ready by each effective date? Walk through each upcoming rule—covering topics such as mandatory Company Entry Descriptions (PAYROLL and PURCHASE), expanded fraud-monitoring requirements for Originators, TPSPs, ODFIs and RDFIs, changes related to International ACH Transactions (IATs), additional contacts in the ACH Contact Registry, changes to funds-availability for certain ACH credits, and a brand-new return reason code.
1:00 PM – 1:50 PM	**Federal Tax Policy Outlook and Its Impact on Tax Credits**	Nick Scott, Mickelson & Company	Insightful education session on transferable federal income tax credits. Technical tax insights related to buying and selling of federal income tax credits, including current guidance, the evolving landscape under the One Big Beautiful Bill Act (OBBBA), implications for estimated tax payments, and key diligence considerations. In addition, the session will share market perspectives on pricing, structuring, and risks, highlight the types of credits they are seeing, and discuss key factors in tax credit purchase agreements.
1:00 PM – 1:50 PM	**Managing Market Risk in Volatile Times**	Kevin Jarvis, HedgeStar Sam Gruer, Blue Rose Capital Advisors	This session will explore how treasury and finance professionals can navigate interest rate volatility amid shifting economic and capital market conditions. Blue Rose and HedgeStar will discuss current interest rate dynamics and practical frameworks for managing interest rate risk. Real-world examples will illustrate how organizations can align interest rate risk management strategies with financial, operational, and reporting objectives.
1:00 PM – 1:50 PM	**Markets in Minutes, What Treasury Needs to Know**	Will Goldthwait, State Street Investment Manager	When you need the "now," not another white paper. This session distills the current economic and policy backdrop, rate and credit conditions, regulatory watch items, cash flow forecasting pitfalls, and guideline implications. Each segment delivers insights, charts, and decision cues - plus takeaways you can share with your team and management. The goal is utility: sharpen your risk radar, validate or revise your market views, and surface the handful of actions that matter this year.

Time	Session Title	Speaker/Organization	Description
1:00 PM – 1:50 PM	**Targeting Real-World FX Optimization Across Merchant and Banking**	Tamir Shafer, Redbridge	Cross-border payments are expanding rapidly, yet managing FX exposure and total transaction costs remains a persistent challenge for global companies. Beyond exchange rates, merchant and bank fees often create hidden margin leakage. This session shares practical strategies to optimize payment flows, improve transparency, and balance automation with strategic intervention across merchant and banking channels.
1:50 PM – 2:00 PM	*Short Break*		
2:00 PM – 2:50 PM	**Virtual Account Management: A Smarter Way to Structure Accounts**	Neil Murphy, PNC Bank Craig Stampfl, PNC Bank Chris Farrier, Smarte Carte Inc.	An efficient, usable account structure is critical for large organizations, enabling strong controls, transparency, and accurate reconciliation. Traditional models, built to support multiple entities, locations and functions, often become complex and costly to manage. Virtual Accounts offer a modern alternative, reducing physical accounts, simplifying structures, and enabling self-service. Join us as we explore key design influences, use cases, and a real-world example of Virtual Account Management in action.
2:00 PM – 2:50 PM	**Balance, Lead, Excel: C Suite Women's Leadership Panel**	Alysa Belting, JP Morgan Kelly Swenson, JP Morgan	The job changed—and so did life. Join a candid, fast paced panel of women finance and treasury leaders sharing real world strategies for work life fit, parenthood, and the evolving post pandemic workplace. Learn how they build resilient teams, lead with flexibility, and deliver results. Walk away with practical tactics on prioritization, boundary setting, hybrid rhythms, and career moves that stick—plus fresh perspectives on sponsorship, visibility, and personal growth to help you thrive through change.

Time	Session Title	Speaker/Organization	Description
2:00 PM – 2:50 PM	**Beyond Basic Reporting: Turning Escheat Compliance from Risk into Strategic Advantage**	Heather Steffans, MarketSphere Unclaimed Property Specialists	Unclaimed property compliance has evolved from a routine filing obligation into one of the most active areas of state revenue enforcement. Holders now face expanded audit scopes, look-back periods of 15 years, contingency fee third-party auditors, and penalty structures that can quickly turn dormant liabilities into multimillion-dollar exposures. This fast-paced session delivers an actionable roadmap for transforming unclaimed property from a compliance headache into a manageable, value-added process. You'll gain fresh insights into the latest enforcement priorities, emerging risks in accounts receivable credit balances, gift card programs, payroll, and vendor payments, plus proven due diligence techniques that actually recover funds owed back to your organization.
2:00 PM – 2:50 PM	**Modernizing Corporate Treasury with AI**	Carlos Conde, Elire Adam Dixon, Kyriba	Corporate treasury is evolving beyond cash management and risk mitigation, facing growing demands for real-time insights and strategic resilience. Legacy tools often fall short, but Artificial Intelligence (AI) offers a transformative path—enhancing forecasting, optimizing liquidity, strengthening fraud detection, and automating compliance. This presentation highlights how AI-driven solutions are reshaping treasury into a proactive, strategic partner through predictive modeling, intelligent risk management, and seamless ERP and open banking integration.
2:00 PM – 2:50 PM	**Building Tomorrow's Finance Teams: Hiring and Compensation Trends for 2026**	Doug Rickart, Robert Half Christine Kelley, Robert Half	To attract top talent with the specialized skills essential for staying competitive and fostering innovation, finance leaders must keep pace with evolving salary and compensation trends. Drawing from our comprehensive 2026 Salary Guide, this presentation examines current compensation practices, including starting salaries, benefits and incentives. Backed by exclusive data, our research provides valuable insights designed to inform effective recruiting strategies and enable more productive, informed salary conversations.
2:50 PM – 3:30 PM	***Break with Exhibitors***		

Time	Session Title	Speaker/Organization	Description
3:30 PM – 4:20 PM	**Leading Through Conflict to Sustain Healthy Teams**	Julie Sampson, Innovative Growth LLC	How we respond to the everyday frustrations and tensions that exist within every team make a profound impact on a work culture. Creating a healthy work culture by navigating these tensions, disappointments, or disagreements creates pathways to influence and impact those around you. This interactive session will connect to the human experience when we face frustrations on a daily basis. You will feel empowered to reframe these situations, build confidence to create healthy dialogue, and respond in ways to build trust and respect.
3:30 PM – 4:20 PM	**A Guide to Corporate Insurance Risk Management**	Tom Colling, FICO	Your personal advancement in Treasury might require understanding and managing insurance. Hear from someone who learned on the job (and who attended sessions like this 20+ years ago). Explore the vocabulary and see why sound insurance management is critical for your organization.
3:30 PM – 4:20 PM	**Treasury Renaissance: Treasury's Emergence as a Strategic Function**	Justin Guerra, Kaufman Hall James Green, Kaufman Hall	Treasury is experiencing a quiet but powerful renaissance as organizations look to it for steadier guidance and sharper foresight. This session explores how treasury is shifting from a transactional function to a strategic powerhouse, influencing decisions across finance and the broader enterprise. The session considers the factors behind this shift and highlights how treasury can better support long-term organizational direction. Attendees will leave with practical steps to build out a modern and strategic treasury function.
3:30 PM – 4:20 PM	**The High Risk of Social Engineering in Financial Crimes**	Matt Hildebrandt, Strata Defense John McCullough, FRPA	Social engineering is a leading driver of financial crime, combining low tech manipulation with high tech tools like phishing platforms, AI, and deepfakes. This session explores how attackers exploit human trust, real world attack scenarios, and where organizations face the greatest risk—along with key warning signs leaders should recognize. Focus is on mitigation and education for your staff.

Time	Session Title	Speaker/Organization	Description
3:30 PM – 4:20 PM	**Ensuring Compliance in Cannabis Payments**	Don Raleigh III, Evolve Payment	In this session, we'll explore the emerging landscape of cannabis payments in Minnesota, focusing on the critical compliance requirements that banks and financial professionals must navigate. Attendees will gain practical insights into understanding secure, compliant payment processing, reducing risk, and staying ahead in this dynamic industry.