MN AFP Speaker Bios

Minnesota Association for Financial Professionals

Annual Conference

May 5, 2026 • Saint Paul RiverCentre

Engage • Enhance • Explore

Speaker	About
Debbie Barr, Associate Managing Director, ACH Network Rules *Nacha*	Debbie Barr administers the Nacha Rulemaking Process, works directly with the Rules & Operations Committee, fulfills the role of Nacha's ACH Operators Relationship Manager, acts as the Rules liaison to the Payments Associations, manages ACH Network research and data, and works closely with Nacha's Education and Communication Departments to promote implementation of new Rules.
Eric Bauer, Commercial Bank Head of Liquidity and Account Solutions *J.P. Morgan*	Eric Bauer leads Global Liquidity Solutions for J.P. Morgan Payments within the Commercial Bank. With over 25 years of experience, he advises companies on international cash management and treasury automation. His career includes leadership roles at RBS, ABN AMRO, SWIFT, and PNC across New York, Amsterdam, and Chicago.
Alysa Belting, Executive Director, Treasury Management Officer *J.P. Morgan*	Alysa Belting is Executive Director and Treasury Management Officer at J.P. Morgan, leading treasury solutions for Mid Corp clients. Based in Minnesota, she brings nearly 20 years' banking experience and holds a B.S. from the University of Minnesota and an MBA from the Carlson School of Management.
Isaac Bravo, Special Agent *IRS Criminal Investigation*	Special Agent Isaac Bravo is a seasoned financial crime professional with a strong foundation in both finance and law enforcement. He earned his bachelor's degree in finance from Weber State University, equipping him with the analytical expertise that has defined his career. Isaac began his professional journey as a fraud investigator with America First Credit Union, where he developed a keen eye for identifying complex financial irregularities and protecting institutional integrity. He now serves as a Special Agent with IRS Criminal Investigation, specializing in uncovering sophisticated financial crimes. In his current role, Isaac is the Coordinator for the SAR (Suspicious Activity Report) Review Team for the District of Minnesota, where he leads efforts to analyze and act on critical financial intelligence. His work plays a vital role in combating fraud, money laundering, and other financial threats, reinforcing trust in the financial system.
Jordan Coakley, International Payments Specialist *J.P. Morgan*	Jordan Coakley has over 6 years of experience covering U.S. headquartered companies at U.S. Bank and J.P. Morgan both in the U.S. and through a global rotation program in Amsterdam. He advises on innovative treasury and international banking solutions to help corporate and commercial clients achieve global operating excellence.
Tom Colling, Treasurer *FICO*	Tom is a former MNAFP President, Board member, Committee Member, and frequent present at MNAFP. He has also presented at AFP and Windy City. He graduated from St. Thomas a long time ago and is the Treasurer of FICO.

Speaker	About
Carlos Conde, Treasury COE Lead *Elire*	Mr. Conde serves as Elire's Treasury Center of Excellence Lead overseeing Elire's SaaS Treasury, ERP Treasury, and Treasury Advisory Services Practices. Mr. Conde has 25+ years of diverse Treasury Implementation and Advisory Services expertise and is recognized as a Trusted Advisor and Thought leader in the Treasury Space.
Dimitri Delis, Managing Director *Piper Sandler*	Dimitri Delis is a Managing Director at Piper Sandler. He is responsible for evaluating economic trends, analyzing current economic issues and generating relative value strategies by integrating fixed income cross-sector trends with macro/economic analysis. He holds a Ph.D. in nuclear physics from the University of California at Berkeley and an MBA from Northwestern (Kellogg School).
Adam Dixon, Executive Treasury Advisor *Kyriba*	Adam Dixon advises finance leaders on maximizing liquidity performance. A Kansas State graduate and CPA, he began in Deloitte's advisory practice. With 20+ years across finance and accounting roles, he helps peers move beyond Excel, automate operations, accelerate careers, increase earnings, and focus on strategic initiatives that improve organizational outcomes.
Chris Farrier, Senior Director of Finance *Smarte Carte, Inc.*	Chris Farrier is the Senior Director of Finance at Smarte Carte Inc. a service provider of convenient products like luggage solutions, secure storage, mobility, and massage chairs. Working in the finance department for over 20 years he has a broad background of all the business requirements when implementing new tools and processes.
Jeff Ferguson, Managing Director, Sales & Client Relationships *Axletree Solutions*	Jeff Ferguson is Managing Director, Sales & Client Relationships at Axletree Solutions. He brings 40 years of banking experience in international treasury management and relationship management across global institutions including HSBC and PNC. A frequent AFP speaker, Jeff specializes in global banking, liquidity, financial messaging, and treasury transformation.
Karen Gilhooly, Founder and Managing Partner *KarenGilhooly.com*	Karen Gilhooly is an executive coach, transformation strategist, and leadership advisor who helps leaders turn complexity into clarity and strategy into execution. With more than 25 years of global experience, she specializes in unlocking human performance by strengthening leadership capability, alignment, and the conditions required for meaningful, lasting change. Her work is grounded in substantial corporate leadership experience. As Global Head of Employee Engagement and Client Experience for HSBC's Liquidity & Cash Management Division, Karen led strategic alignment and reskilling initiatives for more than 4,500 employees and directly managed a 1,400-member global customer-facing organization. Her leadership helped improve client experience, strengthen engagement, and accelerate product and service delivery in a complex, fast-moving financial environment.

Speaker	About
Will Goldthwait, Client Portfolio Manager *State Street Investment Management*	Will is a member of the GFIS and responsible for cash and fixed income strategy. He covers multiple sectors and vehicles. Prior to State Street in 2014, Will was part of RBS and Merrill's Sales Teams and prior worked as a PM for Columbia Management.
James Green, Senior Vice President *Kaufman Hall*	James Green is a Senior Vice President in Kaufman Hall's Treasury and Capital Markets practice, leading the Treasury Operations service line. He delivers analytical, quantitative, and strategic support for treasury solutions, developing holistic strategies and tactical roadmaps that re-engineer treasury structures to enhance efficiency, improve financial performance, and mitigate risk.
Sam Gruer, Managing Director *Blue Rose Capital Advisors*	Sam Gruer brings more than 30 years of capital market experience to his role as Managing Director, where he focuses on the firm's business development efforts and providing senior advisory services. He guides clients through the debt/swap/reinvestment transaction process by making strategic recommendations based on sound, thoughtful, and sophisticated analysis.
Justin Guerra, Vice President *Kaufman Hall*	Justin Guerra is a Vice President in Kaufman Hall's Treasury and Capital Markets practice. He provides analytical and strategic support for innovative treasury solutions. Justin focuses on developing holistic strategies and tactical roadmaps for re-engineering treasury structures to maximize operational efficiency, improve financial performance, and mitigate risk.
Sara Hentges, Senior Director of Operations *UMACHA*	*Sara Hentges has a wealth of knowledge and experience in the payments industry. Her passion for working for the good of the payments network has been the driving force behind her success. Sara's leadership, collaboration, and vast payments knowledge have been instrumental in her ability to support UMACHA's members and the entire team. She is responsible for membership support, services/event support, operations/project management, vendor/technology (IT/IS) management, and the publication program. With Sara's dedication and expertise, UMACHA's operations department is stronger than ever.*
Matt Hildenbrandt, CEO *StrataDefense*	Matt Hildebrandt is the President and CEO of StrataDefense, a cybersecurity and managed IT firm serving regulated industries. He brings over 15 years of IT experience, including hands-on work designing secure, compliant network architectures for financial institutions. Matt focuses on cybersecurity strategy, risk management, and defending organizations against modern threats such as social engineering.

Speaker	About
Kevin Jarvis, Operations Manager *HedgeStar*	Kevin Jarvis is an Operations Manager at HedgeStar, where he leads client reporting services, including outsourced derivative valuation and hedge accounting solutions, and specializes in complex financial instrument valuation and training on valuation, hedging, and risk management topics. He holds a finance degree and MBA from Concordia University along with an FMVA® certification.
Christine Kelley, Sr. Client Service Director *Robert Half*	
John McCullough, President and Founder *FRPA*	John McCullough, CPP, CFE is the President and CEO of the Financial & Retailers Protection Association (FRPA) and CEO of Financial Crimes Services. He has over two decades of experience in financial crime prevention, including leadership roles with the Minnesota Financial Crimes Task Force and extensive work with financial institutions, retailers, and LEA. He has overall 44 years of fighting fraud.
Neil Murphy, Senior Vice President, Corporate Treasury Management *PNC Bank*	Neil Murphy is a Senior Vice President and Treasury Management Officer at PNC, serving large corporate and middle market clients in Minnesota. With 25 years of global treasury experience across London and New York, he brings an international perspective and is CTP accredited.
Ryan Ogden, Special Agent *IRS Criminal Investigation*	Special Agent Ryan Ogden brings deep expertise in accounting and financial investigations to his work in federal law enforcement. He earned both his Bachelor's and Master's degrees in Accounting from the University of Northern Iowa, building a strong technical foundation in financial analysis and reporting. Ryan began his career in the private sector as an Audit Manager with Deloitte & Touche LLP, where he led complex audits and developed a sharp ability to identify financial discrepancies and risk areas across diverse organizations. He now serves as a Special Agent with IRS Criminal Investigation, applying his extensive accounting knowledge to uncover financial crimes, including fraud, tax evasion, and money laundering. Ryan is currently a member of the Minnesota Fraud Task Force, collaborating with multi-agency partners to combat sophisticated financial schemes and protect the integrity of the financial system.
Nasreen Quibria, Senior Vice President, International Advisory *PNC Bank*	Nasreen Quibria is Senior Vice President, International Advisory at PNC, with over 20 years of experience in global financial services. An expert in payments modernization and ISO 20022, she has held leadership roles at Visa, CGI, and the Federal Reserve, and also founded a boutique payments consultancy.

Speaker	About
Don Raleigh III, Cannabis Payments Consultant *Evolve Payment*	Don Raleigh III is a payments and fintech leader specializing in compliance-driven solutions for high-risk industries, including cannabis. As Revenue Operations Manager at Evolve Payment, he helps financial institutions navigate complex regulations. He was recognized as a Top Payments Leader at the PBC Conference in Washington, D.C. for industry impact and innovation.
Doug Rickart, Practice Director *Robert Half*	Doug has over 26 years with Robert Half and is Practice Director for Financial Services in the greater Minneapolis/St. Paul market. He specializes in placing professionals in banking, finance, accounting, risk, compliance, and operations roles and works closely with banks, investment firms, and capital markets organizations to meet their staffing needs.
Julie Sampson, Founder - Owner *Innovative Growth LLC*	Julie is the founder of Innovative Growth, with 25 years' experience as a facilitator and professional speaker. She started her career with Dale Carnegie Training in 1998, working with the MN franchise's largest clients. In 2007 she specialized in workplace conflict to create thriving workplaces and inspire others to respond to conflict & tension with greater confidence.
Jason Schenker, President *Prestige Economics*	Jason Schenker prepares leaders for the future. He is the President of Prestige Economics and Chairman of The Futurist Institute. Mr. Schenker is a top-ranked economist, leading futurist, and bestselling author who delivers high-impact presentations on the economy, financial markets, geopolitical risks, AI, tech trends, and the future of work. Through his talks and research, Mr. Schenker helps clients anticipate risks and seize opportunities. As a trusted voice on the economy, financial markets, geopolitics, and technology trends like AI and quantum, Mr. Schenker has delivered over 1,300 keynotes for public and private companies, corporate boards, industry groups, institutional investors, and government entities. He has spoken at events hosted by the U.S. Federal Reserve, the London Metal Exchange, the Singapore Exchange, the AFP, AICPA, SXSW, the CIA, the DOD, and NATO.
Nick Scott, Vice President *Mickelson & Company*	Nick Scott is a Vice President at BSB, specializing in Corporate Finance and Entrepreneurial Management. He holds an MBA in Financial Services from the University of St. Thomas and brings a diverse background spanning real estate, tax, and transfer pricing. With a strong foundation in financial strategy and advisory, Nick focuses on supporting business growth, optimizing financial structures, and delivering value-driven solutions for clients across a range of industries.

Speaker	About
Tamir Shafer, Head of Sales and Marketing *Redbridge*	Tamir is a senior executive with 30 years of experience across treasury, payments, fintech, and SaaS sales. A former treasury practitioner at Goldman Sachs and Lehman Brothers, he later founded a treasury advisory firm, led Coupa Pay for five years, and now serves as Redbridge's Head of Sales & Marketing for North America and a frequent treasury conference speaker.
Floyd Simpson III, Head of OCIO Public Markets Research *U.S. Bank Asset Management*	Floyd Simpson III is a director based in Philadelphia, Pennsylvania. He leads the public markets research group, managing a team responsible for the selection and oversight of public market investment managers. Floyd contributes to investment decision-making through his roles on the Investment Committee and participation in the manager selection and portfolio construction working groups.
Craig Stampfl, Product Manager – Treasury Management – Liquidity *PNC Bank*	Craig Stampfl is a Liquidity Product Manager at PNC, leading strategy and growth for the Virtual Account Manager product. With over 25 years in treasury management, he brings deep expertise in product innovation, digital solutions, and delivering measurable business results.
Jon Stark, Treasury Management Officer *J.P. Morgan*	**Jon Stark** is a Treasury Management Officer at JPMorgan in Minneapolis with over 20 years of experience in global treasury. In his current role, Jon partners with clients to deliver comprehensive treasury solutions that optimize liquidity, streamline operations, and support strategic growth. His deep background in foreign exchange adds a valuable global perspective in his approach to treasury management. Jon is passionate about helping clients navigate an evolving payments landscape & advancing innovation in treasury.
Carrie Staut, Senior Director Strategic Partnerships *Global Payments*	Carrie has been at Global Payments 35 years starting out on the Issuing side at TSYS. She is currently the Senior Director Strategic Partnerships and supports FI's in meeting and exceeding their goals around deposits, loans and non-interest income by integrating merchant services. Carrie enjoys reading, riding horses and talking payments.
Heather Steffans, Partner, Strategic Solutions *MarketSphere Unclaimed Property Specialists*	Heather has 28 years of professional experience in assessing the escheatment gaps of an organization and marketing unclaimed property solutions to holders. Steffans is recognized in the abandoned and unclaimed property industry as a subject matter expert and thought leader, tradeshow expert, popular industry conference speaker and veteran webinar presenter.
Kelly Swenson, Region Manager – Upper Midwest *J.P. Morgan*	Kelly Swenson is J.P. Morgan's Upper Midwest Region Manager, overseeing Minnesota, Iowa, and Dakotas. With 17 years in banking, she's a Carlson School of Management graduate and a 2026 Minnesota/St. Paul Business Journal 40 Under 40 honoree. In year one, she guides business owners and commercial banking teams through uncertainty and growth.

Speaker	About
Logan Wacker, Senior Sales Executive *FIS*	Logan Wacker is a finance and treasury transformation advisor at FIS, focused on how emerging technologies are reshaping the Office of the CFO. In this role, Logan partners with CFOs and treasurers to modernize treasury, payments, and liquidity—enabling faster, more informed decision-making at scale. Prior to joining FIS, Logan built and led consulting teams at PwC, RSM, and Elire.