

27TH ANNUAL

**Southern
Financial
Exchange**

Conference & Expo

2017

**Strategies for
Faster Payments**

Executive Forum

SFE has a new program for Senior Executives! The inaugural event will kick off during the 2017 Annual Conference, invitations to Senior Executives will go out in Mid-April.

CPA CPE

SFE and Barret School of Banking have joined forces to provide continuing education credits for courses taken at the SFE Conference.

Beau Rivage Resort • Biloxi, MS • May 2-4



Join us in Biloxi!

Who Should Attend:

CEOs, CFOs, COOs, CTOs, CIOs, EVPs, SVPs, Controllers and Comptrollers, CPAs, Compliance Officers, Auditors, Senior Payment Executives, Consultants, Treasury Management Product and Sales teams, Accredited ACH Professionals (AAPs), National Check Professionals (NCPs), Certified Treasury Professionals (CTPs), Operations, Analysts, Treasurers, and individuals from corporate and government sectors with responsibilities in:

- Payments of All Types
- Treasury/Cash Management, Product Management, Business Development, Internet/Electronic/Mobile Banking
- Operations, Product Services, Deposit Services, Compliance/Audit, Fraud/Risk Prevention
- RDC, Check, & Image Services

Continuing Education Credits

Earn up to 15.6 AAP Credits, 15.4 CPA Credits and/or up to 8.4 NCP Credits (CEUs). Two additional credits can be earned by attending a preconference workshop. Sessions may also be eligible for other industry certification renewal credits (CCM, CTP or other accreditations), check with your certifying organization for eligibility requirements.



*SOUTHERN
FINANCIAL EXCHANGE*

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visit
www.sfeannual.org

Keynote Session



Richard R. Oliver

Independent Payments Consultant

TPI Dean Emeritus

Retired EVP of the Federal Reserve Bank of Atlanta

MIND THE GAP!

While we are going through a period of unprecedented change in the payments system, some remarkable gaps still exist that limit safety, convenience, and ease of use. This opening general session focuses on those gaps, challenges us collectively to close the gaps, and suggests strategies to move the agenda forward across all payment types.

General Sessions



SAME DAY ACH: THE FUTURE IS HERE!

Same Day ACH changed the Network on September 23, 2016. In this session, you will hear from the three organizations who are jointly responsible for the implementation of Same Day ACH across the ACH Network. NACHA and both ACH Operators - the Federal Reserve and The Clearing House – will share what we learned from Phase One, the volume we've experienced, what went well and what could have gone better. The panel will also discuss how to leverage the opportunities that will come with same day debits in Phase Two, and how to be better prepared from the lessons learned with same day credits.

Steve Ledford, *Senior Vice President Product and Strategy, The Clearing House*

Michael Herd, *Senior Managing Director ACH Network Rules, NACHA*

Wendy Radford, *AAP, Product Development Liaison RPO, Federal Reserve Bank of Atlanta*



THE MUSTS OF GAINING A COMPETITIVE ADVANTAGE

What are the BEST PRACTICES that are the MUSTS for Providing a Positive Differentiating Experience and Gaining a Competitive Advantage? This is a fast pace presentation challenging the typical thinking about R E A (Retaining, Expanding, Attracting) the RIGHT customers.

Charles Wilson, *Principal Banking Industry Group, Inc*



NOT JUST FASTER - BETTER

The U.S. is moving toward a future of payments that are not only faster, but better. Understanding all the initiatives underway, including the Faster Payments Task Force, Same Day ACH, Zelle, TCH RTP and others, is a daunting task. In the end, the effort will be worth it as financial institutions bring better, faster, safer products to market. Steve Ledford will provide an overview of faster payments initiatives and outline a vision of how they will propel payments innovation by financial institutions.

Steve Ledford, *Senior Vice President Product and Strategy, The Clearing House*



FIVE TRENDS THAT WILL CHANGE YOUR BANK FOREVER

It's unavoidable. Change and disruption are natural parts of banking and technology. In the next few years, we will see major changes in the banking industry. Those who are best positioned to manage this change will emerge as the leaders who "got it". Today's successful bankers must embrace technology to survive in an ultra-competitive market where nimble providers are threatening the traditional banking model. High performance will depend on sound strategy and flawless execution. Learn about five trends that are changing how business gets done.

Jimmy Sawyers, *Chairman, Sawyers & Jacobs LLC*



WELCOME TO THE LAND OF FINTECH

Financial services are rapidly changing. FinTech is hot. Silicon Valley has become synonymous with innovation and disruption. Venture Capital and Private Equity firms have funded a record \$20B of FinTech investments in the past 2 years alone. Where is the money going and why? Which companies are poised for success? What kinds of companies are running out of money and at risk of going under? How are banks evaluating new ideas and investments? Will banks and non-banks get in on the action together? What does all this mean for Treasury professionals and their companies?

Joe Proto, *CEO and Chairman, Transactis*

Tuesday, May 2nd

8:30 AM – 6:15 PM	Registration Open		
9:00 AM - 10:30 AM	Refreshments		
10:20 AM - 12:00 PM	Pre-Conference Workshops		
	<p>Effectively Handling ACH Exceptions - What You Need to Know Now!</p> <p>Everything is great when payments post as expected, but sometimes payments processing is not perfect!! And, the most likely area for financial institutions to suffer loss in payments processing is exception handling. This hands on workshop will provide attendees with an overview of responsibilities for properly handling ACH exception items. From NSF to complex disputed transaction situations, we'll walk through the types of exception items and the rules/regulations responsibilities and requirements and then dive into case studies for a better understanding of handling real life situations. If you work in ACH payments processing, you need to attend this workshop!</p> <p><i>Earn 2 AAP Credits</i></p> <p style="text-align: right;">Wendy Wishon, AAP, NCP SVP EPCOR</p>	<p>The Art and Science of Check Return Codes</p> <p>Have you ever had trouble deciding which return code to use? You are not alone! Selecting the correct return code is part art and part science. Ms. Johnson will walk participants through all the check return codes—including the newest return codes enacted a little over a year ago. Then she will discuss how some codes are similar and how to pick the best code based on circumstances of the case. She will also discuss how some return codes are not really return codes but rather warranty claims that travel through the return system. Participants will have the opportunity to walk through some return scenarios and pick codes, leaving with a better understanding of return codes as well as a quick reference sheet and a link to the X9 paper Proper Use of Return Codes.</p> <p><i>Earn 1.2 AAP & NCP Credits</i></p> <p style="text-align: right;">Jenny Johnson, NCP Director ECCHO</p>	<p>Building and Maintaining a Quality ACH Origination Program</p> <p>Not sure how to get started in ACH Origination? Not sure how to manage your ACH Origination Program now that it's off the ground? Do you want to know the ins and outs of ACH Origination? If so, join us as we explore ways on how to obtain, maintain and monitor a quality ACH Origination Program.</p> <p><i>Earn 2 AAP Credits</i></p> <p style="text-align: right;">Kelly Caspersen, AAP Assistant Director Member Services Southern Financial Exchange</p>
	12:00 PM - 1:15 PM Lunch On Your Own		
1:15 PM - 2:30 PM	<p>Welcoming Remarks Donald S. Jackson, AAP, CTP President & CEO Southern Financial Exchange</p> <p>KEYNOTE ADDRESS - Mind the Gap! While we are going through a period of unprecedented change in the payments system, some remarkable gaps still exist that limit safety, convenience, and ease of use. This opening general session focuses on those gaps, challenges us collectively to close the gaps, and suggests strategies to move the agenda forward across all payment types.</p> <p><i>Earn 1.2 AAP & NCP Credits</i></p> <p style="text-align: right;">Richard R. Oliver Independent Payments Consultant TPI Dean Emeritus Retired EVP, Federal Reserve Bank of Atlanta</p>		
	Concurrent Session I		
2:45 PM - 3:45 PM	<p>ACH Fraud Prevention in the Electronic World</p> <p>As ACH activity increases both in volume and value, so does the risk and interest from cybercriminals and money launderers around the globe. The session provides an overview of the challenges FI's face in dealing with ACH fraud and risk, and the tools available to help them reduce their exposure. Discussion topics will include a review of ACH exposure limits, underwriting, ACH Prefunding, ACH Positive Pay, SEC Monitoring and other fraud and risk controls.</p> <p><i>Earn 1.2 AAP Credits</i></p> <p style="text-align: right;">Debbie Smart, CTP, NCP Senior Business Consultant Q2eBanking</p>	<p>Checks and Other Negotiable Instruments – A Legal View of Payments</p> <p>Articles 3 and 4 of the Uniform Commercial Code (UCC) and Federal Reserve Regulation CC governs checks, drafts, and other negotiable instruments, establishing criteria that influences and may govern faster payment alternatives. We will examine the relationship between a financial institution and its customers and the relationship between financial institutions. How will a financial institution's policies and procedures impact the outcome in a lawsuit? This session was created to educate bankers in a down-to-earth fashion on the laws and regulations that govern checks and is structured in a manner that takes very complex laws and presents them in simple layman's terms.</p> <p><i>Earn 1.2 AAP & NCP Credits</i></p> <p style="text-align: right;">Paul Carrubba Partner Adams & Reese LLC</p>	<p>Prepare, Respond, Recover</p> <p>Nothing is more important than your safety, as well as, your employees, and your customers. This session identifies procedures to better prepare your institution in the event of a robbery, equip you with response tactics, and expose you to the recovery process. This session covers deterrence trends, surveillance best practices, and law enforcement partnerships. After attending, you understand the steps needed for a robbery program at your institution that includes preparation, response, and recovery.</p> <p><i>Earn 1.2 AAP Credits</i></p> <p style="text-align: right;">Mike Burke Shazam</p>
	3:45 PM - 4:15 PM Refreshment Break – Co-Sponsored by: Triumph Bank & Wymar Federal Credit Union		

Tuesday, May 2nd *continued*

4:15 PM - 5:15 PM

Concurrent Session II

Identifying Payment Systems Risk: The Holy Grail of Risk Assessments

This session takes a deep dive into risk management methodologies and examines how to identify and differentiate between risks, consequences and controls.

Earn 1.2 AAP & NCP Credits

David Payne, AAP, NCP, CIA, CFSA
Vice President
Risk Management Services
ePayResources

Remote Deposit Capture – Pulse on the Market

Remote Deposit Capture continues to transform banking and payments. RDC has fueled branch transformation & enterprise risk management, and has been a critical driver of mobile banking. Recent developments continue to expand the use, markets and applications of RDC solutions. Gain unique insights by leveraging RDC Industry Poll results; learn about functionality benchmarking, updates on risk management, new technology innovations and industry opportunities by attending this presentation.

Earn 1.2 AAP & NCP Credits

John Leekley, NCP
CEO
RemoteDepositCapture.com

Rethinking Retail Cash Operations: Provisional Credit or Settlement Funds

In the past thirty years two major consumer payment methods have evolved from manual processes to automated - checks and credit/debit cards. However, cash has remained stagnant. In this session, we will examine how cash is changing from a traditional payment method to a commodity. We will look at the differences between provisional credit and settlement funds and inspect how these changes will affect the way that the modern retailer manages cash operations in the future.

Chris Decator
VP of Business Development
ARCA

5:30 PM - 7:00 PM

Welcoming Reception – Cocktails & Hors D'oeuvres with Exhibitors (Cash Bar)

Wednesday, May 3rd

7:00 AM - 4:20 PM

Registration Open

7:15 AM - 8:00 AM

Networking Continental Breakfast – Sponsored by: BankPlus

8:00 AM - 9:30 AM

GENERAL SESSION - Same Day ACH: The Future is Here!

Same Day ACH changed the Network on September 23, 2016. In this session, you will hear from the three organizations that are jointly responsible for the implementation of Same Day ACH across the entire ACH Network. NACHA and both ACH Operators - the Federal Reserve and The Clearing House – will share what we have learned from Phase One, the volume we've experienced, what went well and what could have gone better. The panel will also discuss how to leverage the opportunities that will come with same day debits in Phase Two, and how to be better prepared from the lessons learned with same day credits.

Earn 1.8 AAP Credits

Michael Herd
Senior Managing Director
ACH Network Rules, NACHA

Steve Ledford
Senior Vice President
Product and Strategy
The Clearing House

Wendy Radford, AAP
Product Development Liaison, Retail Payments Office
Federal Reserve Bank of Atlanta

9:30 AM - 10:00 AM

Refreshment Break – Sponsored by: Renasant Bank

10:00 AM - 11:00 AM

Concurrent Session III

The Balancing Act of ODFIs and Third Party Senders

NACHA has increased their focus on Third Parties, from rule changes and a Third Party Sender Registration, this session will help you be in the best position to manage your Third Parties. Do you know the characteristics of a Third Party Sender? The instructor will help you identify some strategies you can use to identify potential Third Parties that you may currently have as well as review the NACHA Third Party Sender Identification Tool. They will also explore requirements for having Third Party relationships under the NACHA Operating Rules, a review of the recently approved Third Party Sender Registration Rule as well as offer some risk mitigation steps to better manage your Third Party Relationships.

Earn 1.2 AAP Credits

Sandy Ortins, AAP, NCP
VP, Education
NEACH

Payments 2.0 – Future Proofing Your Payment Strategy

The payment ecosystem continues to evolve and the pace of change steadily increases. Today, control and flexibility are top of mind for consumers. To remain relevant and profitable, it should be top of minds for issuers and acquirers as well. In this session, we will address the impact and opportunities that have emerged from some of the most recent trends and industry shifts, such as: EMV implementation, fraud, digital banking adoption and growth in FinTech partnerships. We will explore strategies for leveraging technology, data and new operating models to optimize loyalty, risk management and consumer engagement in the decade ahead.

Earn 1.2 AAP Credits

Dondi Black
VP Product Strategy
FIS Global

Overview of the U.S. Payments Industry

This presentation will provide an overview of the U.S. Payments Industry and talk about what to expect from the major payments instruments and business lines in the next 5 years as major forces impacting the payments space (economy, regulation, consumer behavior, technology and competitive landscape) continue to evolve.

Earn 1.2 AAP & NCP Credits

Chris Gill
Senior Expert
GC Insights

Smita Kapoor
Practice Expert
GC Insights

Wednesday, May 3rd *continued*

11:10 AM - 12:10 AM

Concurrent Session IV

ACH Network Development Blueprint for the Future

Already heard about Same Day ACH? At this update from NACHA's Rules Department, come hear the latest on NACHA's other Rules, Risk Management and ACH Network initiatives. Topics include: NACHA's project on APIs; Rules-related concepts on ACH messaging and account data security; NACHA's upcoming registration database for Third-Party Senders, and more!
Earn 1.2 AAP Credits

Mike Herd
Senior Managing Director
ACH Network Rules, NACHA

Under the Hood: Prepaid Pistons and Spark Plugs

Once the fastest growing noncash payment type, prepaid products have made a major impact on the payments ecosystem. Benefit from an in-the-weeds discussion of prepaid products and services, systems and operations, including strategies and practices. We will explore various roles and responsibilities in the value chain while learning what the key requirements are that impact compliance programs. Also come to understand why prepaid has the horsepower to be a consumer favorite.
Earn 1.2 AAP Credits

Jessica Washington
Payments Risk Expert
Retail Payments Risk Forum
Federal Reserve Bank

What to Expect At Your Next Regulatory Exam

Tony DaSilva will discuss regulatory hot topics such as InTrex, FFIEC updates, and Cyber Assessment Tool (CAT). He'll recommend techniques you can use at your institution to identify areas that need improvement. This practical discussion will equip you with confidence as you prepare for your next exam.
Earn 1.2 AAP & NCP Credits

Tony DaSilva, AAP, CISA
S&R Senior Technical Expert
Federal Reserve Bank of Atlanta

12:15 PM - 1:30 PM

AAP Recognition Luncheon – Co-Sponsored by: NACHA-The Electronic Payments Association

GENERAL SESSION - The MUSTS of Gaining A Competitive Advantage

What are the BEST PRACTICES that are the MUSTS for Providing a Positive Differentiating Experience and Gaining a Competitive Advantage? This is a fast pace presentation challenging the typical thinking about R E A (Retaining, Expanding, Attracting) the RIGHT Customers.
Earn 0.9 AAP Credit

Charles Wilson, Principal, Banking Industry Group, Inc.

1:45 PM - 2:45 PM

Concurrent Session V

Ask the Experts!

Have you wanted to ask a payments question but felt it wasn't the time or place? The opportunity is here, the floor will be open! SFE Staff will be answering questions on any type of payments issue. Whether you have a question about an upcoming ACH Rule change such as Same Day ACH, or how to respond to an exception item, the experts will be available face-to-face to provide the answer. SFE staff serves as your ACH Rules Interpreters and will be willing to provide the answer to your most difficult or simplest problem. Don't hesitate to open up and ASK!
Earn 1.2 AAP & NCP Credits

Kelly Caspersen, AAP
Assistant Director Member Services
Southern Financial Exchange

Danita Moss, AAP
Assistant Director Member Services
Southern Financial Exchange

Billy Reed, AAP
Assistant Director Member Services
Southern Financial Exchange

Emerging Trends in Card Payments From EMV to Tokenization, Digital Wallets and Beyond

Interchange, chip cards, tokenization, breaches, counterfeits and skimming have become everyday words in the payments industry. Facing an increasing threat while dealing with higher expenses, we need to work smarter-and-harder while seeking to grow. In this session, we will explore ways payments can generate revenue, both current and future trends facing the industry, and what can be done to stay ahead of the non-stop efforts of those who want nothing more than to take every dollar you have.
Earn 1.2 AAP Credits

Matt Herren
Product Manager
CSI

Could Foreign Exchange Make Your Bank Money?

If the words 'foreign exchange' cause you to turn and run, stop! Learn how to help your clients and bring more money to your bank's bottom line by attending this session. We'll talk about how offering clients the comfort and ability to do business in another currency can benefit them. Doing business in U.S. Dollars alone is letting somebody else control their business and yours. Wires, checks, ACH and foreign currency accounts are all services that can create foreign exchange revenue - revenue over and above a transaction fee!
Earn 1.2 AAP Credits

Stephanie Russell
EVP, International
First Tennessee Bank, N.A.

2:45 PM - 3:20 PM

Networking Exhibit Review & Refreshment Break – Co-Sponsored by: Coastal Commerce Bank and Planters Bank & Trust Company

3:20 PM - 4:20 PM

Concurrent Session VI

Know Your Customers and Your Customer's Customers Through Data Analytics

Financial Institutions generate a wealth of transaction data on a daily basis. This session focuses on use of private and public data to better profile the financial institution's customers.
Earn 1.2 AAP & NCP Credits

Rajiv Donde
President
Laru Technologies

Mobile Doesn't Matter

Banking's "line of service," the imaginary boundary where financial services and consumers meet, has been pushing deeper into customers' lives for at least fifty years. In their turn, ATMs, telephone banking, PCs, and the Internet each brought users into closer proximity with financial services. Now the mobile device has brought yet another sweeping revolution. And the pace of change is not slowing. On the contrary, new technologies are emerging at an increasingly rapid pace. In the midst of this ongoing technological evolution, there are two important questions your financial institution should be asking: What's next? And what do we need to do to be prepared for it?
Earn 1.2 AAP & NCP Credits

Kevin Moland, AAP
Director of Product Strategy for
Enterprise Payment Solutions
Jack Henry and Associates

ISO 20022 Basics

ISO 20022 is a hot industry topic, but many financial institutions are wondering what it is and what it means to their business. This interactive session will explore the basics of ISO 20022, the business case and proposed timing for both Wire and ACH adoption in the U.S.
Earn 1.2 AAP Credits

John Morris
Retail Payment Projects Director
Federal Reserve Bank Atlanta

Thursday, May 4th

7:15 AM - 12:00 PM	Registration Open
7:30 AM - 8:40 AM	Networking Continental Breakfast
8:40 AM - 10:10 AM	<p>GENERAL SESSION - Not Just Faster - Better</p> <p>The U.S. is moving toward a future of payments that are not only faster, but better. Understanding all the initiatives underway, including the Faster Payments Task Force, Same Day ACH, Zelle, TCH RTP and others, is a daunting task. In the end, the effort will be worth it as financial institutions bring better, faster, safer products to market. Steve Ledford will provide an overview of faster payments initiatives and outline a vision of how they will propel payments innovation by financial institutions.</p> <p><i>Earn 1.8 AAP & NCP Credits</i></p> <p style="text-align: right;"><i>Steve Ledford Senior Vice President Product and Strategy The Clearing House</i></p>
10:10 AM - 10:25 AM	Refreshment Break
10:25 AM - 11:55 AM	<p>GENERAL SESSION - Five Trends That Will Change Your Bank Forever</p> <p>It's unavoidable. Change and disruption are natural parts of banking and technology. In the next few years, we will see major changes in the banking industry. Those who are best positioned to manage this change will emerge as the leaders who "got it" and thrived. Today's successful bankers must embrace technology to survive in an ultra-competitive market where nimble providers are threatening the traditional banking model. High performance will depend on sound strategy and flawless execution. Learn about five trends that are improving our lives and changing how business gets done.</p> <p><i>Earn 1.8 AAP & NCP Credits</i></p> <p style="text-align: right;"><i>Jimmy Sawyers Chairman Sawyers & Jacobs LLC</i></p>
12:00 PM - 1:30 PM	<p>Luncheon – Sponsored by: Federal Reserve Bank of Atlanta</p> <p>GENERAL SESSION - Welcome to the Land of FinTech</p> <p>Financial services are rapidly changing. FinTech is hot. Silicon Valley has become synonymous with innovation and disruption. Venture Capital and Private Equity firms have funded a record \$20B of FinTech investments in the past 2 years alone. Where is the money going and why? Which companies are poised for success? What kinds of companies are running out of money and at risk of going under? How are banks evaluating new ideas and investments? Will banks and non-banks get in on the action together? What does all this mean for Treasury professionals and their companies?</p> <p><i>Earn 0.9 AAP Credits</i></p> <p style="text-align: right;"><i>Joe Proto CEO and Chairman Transactis</i></p> <p style="text-align: center;"><i>Don't miss drawings for cash and prizes – you must be present to win!!</i></p>
1:30 PM	Conference Adjourns



Hotel Information

Beau Rivage Resort & Casino
875 Beach Boulevard
Biloxi, MS 39531



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An MGM Resorts Luxury Destination

To reserve your room, please contact the **Beau Rivage at 888.567.6667**. The room rate for participants is \$143 single or double. To receive the group rate, the caller must identify themselves as attending the "**SFE 2017 Annual Conference**". By registering early, you are more likely to be assigned the room type of your choice. Reservations must be made by April 7, 2017 (after this date, reservations are subject to availability). The Beau Rivage will charge for your first night's room and tax deposit to your credit card at the time your reservation is made. The deposit is non-refundable if cancellation occurs within 48 hours of your scheduled arrival time.

Registration

You may register for the conference online through our secure server at www.sfeannual.org, by mail or fax using the form provided on the next page. Payments will be processed at the time of registration.

Dress Code

Business casual is suggested for all events. We suggest you bring a sweater or jacket for your comfort.

Special Needs

If you require special accommodations to participate in this conference, please send an email by April 7th to tricia@sfe.org.

Refunds, Cancellations & Substitutions

Requests for refunds will be accepted if received in writing by April 7, 2017. A cancellation fee of \$35 per attendee will be charged. For cancellations received after April 7th, no refunds can be issued. Substitutions are accepted in writing at any time. Failure to attend will not serve as a cancellation request. Fees for workshops, conferences, materials or services paid to Southern Financial Exchange (SFE), a not-for-profit corporation, may be deductible for members' federal income tax purposes as ordinary and necessary business expense. Please consult your tax advisor for individual assistance in specific member situations.

Southern Financial Exchange

The mission of SFE is to promote sound business practices through education, training and industry representation for our members use of ACH and other payment systems.

Green Initiative

In an effort to reduce waste and decrease the use of paper products, there will be **no paper copies of session handouts** at the event. Conference presentations will be available one week prior to the conference, should you wish to review or print this material. Presentations will also be available for two months after the event.

Special Thanks!

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Exhibitors



Sponsor and Exhibitor Opportunities Are Still Available!

27TH ANNUAL



Three Ways To Register:

- 1 ONLINE @ www.sfeannual.org
2 EMAIL/FAX Registration Form to tricia@sfe.org or (504) 525-1693
3 MAIL registration form to:



1340 Poydras Street • Suite 2010
New Orleans, LA 70112

Conference Registration Fees:

Table with 4 columns: Registration Category, Through April 7th, After April 7th and on site, and Every 3rd Registrant from your organization. Rows include Fls, Affiliate Members & Corporations With Referral, Corporations Without Referral, and Pre-Conference Workshops.

*Every 3rd registrant from your organization is FREE but please register by April 7th. To qualify, submit the registration form below to the SFE office no later than April 7th. Fees are per person. Submit multiple registrations online at www.sfeannual.org on letterhead or duplicates of this form.

Attendee Information:

NAME (will appear on badge)
AAP CCM CTP NCP Other: Specify
TODAY'S DATE:
TITLE
ORGANIZATION
ADDRESS
CITY STATE ZIP
PHONE FAX
E-MAIL Please do not release my e-mail

Have you attended this conference before: Yes No

SFE Member Referral for Corporations

If you have a relationship with an SFE member, fill in the referral information below and register at the member price:

FI: Contact Name:
PHONE Information will be verified with the SFE member.

Payment Information:

Table for payment information with rows for Conference Fee, Spouse/Guest Registration, Workshop (with sub-options), and a TOTAL row.

Method Of Payment:

Make check payable to Southern Financial Exchange.

Check Send Invoice ACH Direct Payment R/T# DDA/GL# (circle one) & Account #:

Authorized Signature Print Name

Fees are per person. You may register online and pay via ACH or check. Registrations will not be considered "confirmed" until payment is received.