

EMPLOYEE BENEFIT  
INDUSTRY TRENDS  
BUSINESS FAIR FEE  
INFORMATION TECHN  
EXPAND COMPETITION  
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FASB FAIR FEES EMPLOY  
WALL STREET RESOUR  
ORGANIZED RETAIL CRI  
COST CONTROLENERGY  
COMPETITIVE ADVANT  
EMPLOYEE BENEFIT  
WELLNESS FASB

2020  
Financial Executive Conference  
May 18-20 • Arizona Biltmore Resort and Spa • Phoenix, AZ



# REGISTRATION FORM

## 58th ANNUAL FINANCIAL EXECUTIVE CONFERENCE Arizona Biltmore Resort and Spa • Phoenix, AZ • May 18-20, 2008

To register online, go to [www.fmi.org/events/](http://www.fmi.org/events/) and select Financial Executive Conference. Click on "register online" and follow the instructions.  
Registration questions? Contact Heather Cain at 202.220.0815 or [hcain@fmi.org](mailto:hcain@fmi.org).

### PLEASE TYPE OR PRINT CLEARLY

Company \_\_\_\_\_ Phone \_\_\_\_\_  
Mailing Address \_\_\_\_\_ Fax \_\_\_\_\_  
City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_  
Confirm to \_\_\_\_\_ Title \_\_\_\_\_ E-mail \_\_\_\_\_

### REGISTRANT INFORMATION

Last Name	First Name	Badge Name	Title	E-mail (required for confirmation)
Mr. _____	_____	_____	_____	_____
Ms. _____	_____	_____	_____	_____
Mr. _____	_____	_____	_____	_____
Ms. _____	_____	_____	_____	_____
Mr. _____	_____	_____	_____	_____
Ms. _____	_____	_____	_____	_____

Companion Name (no registration fee)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please check all that apply**  
First Time Attendee  Sunday, May 18

**REGISTRATION FEE:** We cannot process your registration without proper payment. We are unable to send invoices for the registration fees. Fee includes all meeting materials, breakfasts, brunch, lunch, refreshment breaks and receptions. It does not include hotel accommodations.

**Please make room reservations directly with the Arizona Biltmore Resort and Spa (602.955.6600 or 1.800.950.0086).**

FMI Member:  \$675.00 per person  
 \$625.00 per person if 3 or more (paid) attend from the same company  
FMI Associate Member:  \$935.00 per person  
Non Member:  \$1,125.00 per person

**Cancellation:** Full refund if cancellation is received by May 9 (COB); 60 percent if received by May 16 (COB).  
No refund if cancellation is received after May 16 (COB).

Note: To qualify for FMI member rates, every participant must be an employee of an FMI member company. Please remember, an FMI member is either a retailer or wholesaler paying annual dues to FMI. An associate member is a supplier company paying annual associate membership dues to FMI. All others are non-members. Walk-in registrations accepted only if accompanied by cash, company check or credit card payment of the registration fee.

### PAYMENT INFORMATION:

Enclosed is my check (U.S. funds drawn on a U.S. bank – payable to Food Marketing Institute) for my registration fee.  
Please be sure to return this registration form with check to: **P.O. Box 75884, Lockbox #75884, Baltimore, MD 21275-8884.**  
Wire transfers acceptable in U.S. funds. For assistance with wire transfers contact Van Jackson (202.220.0755).

Fax this form with credit card information to **202.220.0878**. Please charge \$ \_\_\_\_\_ to my  Visa  Mastercard  American Express

Account No. \_\_\_\_\_ Exp. Date \_\_\_\_\_

Card Holder Name (please print) \_\_\_\_\_

Card Holder Signature (**must sign to be valid**) \_\_\_\_\_

 FMI is committed to participation in its programs by persons with disabilities.  Please check if you need accommodations.  
Please specify \_\_\_\_\_

In general, Treasury Regulation 1.162-5 permits an income tax deduction for educational expenses undertaken to maintain and improve professional skills.



#60/61-004-0222

# Financial Executive Conference

May 18-20 • Arizona Biltmore Resort and Spa • Phoenix, AZ

**Gain a sustainable competitive advantage** by staying current on industry trends and finding new ways to improve operations.

If growing the business while controlling costs and thwarting competition is a priority, you don't want to miss the Financial Executive Conference in 2008.

**Education and networking opportunities** will expose you to new ideas and expand your strategic thinking.

### Case studies and general sessions include:

- Organized retail crime
- Hot retail technologies
- Changing your energy signature
- Wall Street view of the supermarket industry
- Incentive compensation practices and trends
- The role of wellness in employee benefit plans

### Leave this conference with:

- Critical industry information to help you make better informed and strategic decisions.
- Enhanced corporate strategies to align people, processes and systems to reach maximum profitability.
- Expanded professional networks to learn from your peers.

### Don't miss the most important food retail industry financial conference this year.

# CONFERENCE PROGRAM

## SUNDAY, MAY 18

**9:30 am - 11:30 am** **Registration**

**11:00 am - 12:30 pm** **Brunch**

Sponsored by International Outsourcing Services LLC

**1:00 pm - 1:15 pm** **Opening/Welcome**



**Gino DiGrazia**

Vice President & Controller  
Business Analysis & Reporting  
Publix Super Markets, Inc.  
(Conference Chair)

Gino DiGrazia joined Publix Super Markets in 1992 as manager of cost accounting. He currently oversees the company's financial reporting, business analysis, planning/goal setting and manufacturing/distribution accounting functions. Prior to joining Publix, Gino worked as an audit manager with Deloitte & Touche. He is a CPA and a graduate of Ohio State University.

**1:15 pm - 1:45 pm** **Keynote Address**

**1:45 pm - 2:45 pm** **The View from Wall Street**

How might the economy impact supermarket operators? What about encroaching competition? Who has the competitive edge and who will survive? Learn what *The Street* thinks in terms of the supermarket industry.



**Scott A. Mushkin**  
Vice President and  
Senior Research Analyst  
Banc of America Securities LLC

Scott Mushkin covers food and drug retailing and healthy lifestyle for Banc of America. He previously was a vice president and a senior analyst at Lehman Brothers, covering the healthy lifestyle sector. In 2006, Scott was named "Best Up-and-Comer" and last year was a runner-up on the Institutional Investor "All-America Research Team." He began his career as a syndicate manager at Kidder, Peabody, Inc. / Paine Webber before joining PMM Investment Management Group at Donaldson, Lufkin & Jenrette as an investment executive/partner. Scott received a B.A. degree in history from Boston College and an M.B.A. degree from the University of Chicago.

**2:45 pm - 3:00 pm** **Refreshment Break**

Sponsored by APEX Analytix

**3:00 pm - 3:45 pm** **The Charge toward Fair Fees and More**

Get current on the operational and strategic issues facing the payments/finance/treasury side of food retailing. Learn more about how to manage these challenges and how they impact your bottom-line.

**Natan Tabak**

Senior Vice President and CIO  
Wakefern Food Corp.  
(EPS Committee Chair)

**3:45 pm - 4:45 pm** **Changing Your Energy Signature - A Value Proposition Realized**

Over the past few years, energy has changed from an almost benign issue with understood impacts on business and society within certain limits of economic and cultural acceptability to a highly-visible issue with extreme volatility and associated risks from market pricing to "green" corporate imaging. Your ability to manage energy use and costs is now critical to the future of your business. Learn the market trends and government actions affecting the industry's energy future. Find out how one company is managing this issue through capital improvements resulting in reduced costs and decreased future business risks.



**Steve Kiesner**

Director, National Accounts  
Edison Electric Institute

Prior to joining EEI, Steve Kiesner was with the Potomac Electric Power Company (Pepco) for seven years, serving as customer representative for several federal government agencies, including the GSA, White House Architect of the U.S. Capitol, National Parks Service, Smithsonian Institution and the FBI. He was also involved in implementing Pepco's Curtailable Load Program, an end-use management program for large commercial customers. Steve has a B.S. degree in economics and business-finance.



**Joe Mac Johnson**

Vice President  
Facility Services  
Brookshire Grocery Company

Over the last two years, Joe Mac Johnson led the functional construction department realignment into a multi-functional facilities group. He oversaw the redevelopment of store floor plans to include new materials, components and energy features which significantly reduced construction and store operational costs. As part of the realigned focus, Joe Mac oversaw a company-wide energy audit from which a new mechanical systems recommissioning and controls project was developed. He previously was director of their utilities management department and led the company into the Texas deregulated utilities market with the first competitive market contract for BGC. Joe Mac worked for thirteen years in the electric utility industry developing marketing and conservation programs before joining Brookshire in 1999. He holds a B.S. in building construction from Texas A&M University.

**6:00 pm - 7:30 pm** **Reception**

Sponsored by PRG Schultz International

## MONDAY, MAY 19

**7:00 am - 8:00 am** **Breakfast**

Sponsored by Connolly Consulting

**8:00 am - 12:00 pm** **Business Session**

**Rick Mills**

Senior Vice President & Treasurer  
CFO  
Weis Markets, Inc.  
(Session Chair)

**8:00 am - 9:00 am** **Hot Retail Technologies**

Get up to speed on the latest retail technology trends that will be key to food retailers, including developments in ERP, asset protection, PCI and Tesco technology initiatives. Results of the "state of the store" survey conducted by AMR Research will be shared.



**Michael Griswold**

Research Director, Retail AMR Research, Inc.

Mike Griswold has over two decades of experience in grocery and general merchandise retail. He is primarily responsible for researching, analyzing and writing about the technologies, best practices and trends that grocers and other fast-moving consumer goods retailers use to maintain and enhance their business and retail operations. Prior to joining AMR, Mike was the director of supply chain business programs at Albertson's. He previously held several positions at Shaw's Supermarkets and spent nine years at Hills Department Stores. He holds a B.S. in business management from Canisius College and an M.B.A. from the Whittemore School of Business and Economics at the University of New Hampshire.

**9:00 am - 10:00 am** **Organized Retail Crime (ORC)**

Get a food retailer's perspective on the fastest-growing area of external retail theft. Actual retailer experiences in building ORC awareness within the industry and with public officials and law enforcement will be shared.



**Kathleen Smith**

Vice President, Loss Prevention  
Safeway Inc.

Kathleen Smith is responsible for security and loss prevention for more than 1,800 stores in the U.S. and Canada, 33 manufacturing facilities, 20 warehouse facilities and buying offices worldwide. She has more than 30 years of security management and law enforcement experience. Kathleen holds a master's degree in communications from Pepperdine, advanced police officer standards and training certificate from the state of California, and was elected to the "Who's Who of American Women" in 1999. She chairs FMI's loss prevention committee.

**10:00 am - 10:15 am** **Refreshment Break**

Sponsored by APEX Analytix

**10:15 am - 11:00 am Financial Accounting Standards Board (FASB) Update**

Learn more about recent rules issued in the areas of lease accounting and income tax uncertainties accounting. Find out more about what other current/future topics are being discussed and how they may impact you.

**Larry Bello**  
Audit Partner  
KPMG LLP

As the KPMG professional practice partner in their Phoenix office, Larry Bello consults with client service teams on technical accounting matters and coordinates national office involvement on emerging accounting and auditing issues. He has served public companies and been involved with numerous equity and debt offerings and merger and acquisition transactions for more than 22 years. Larry is designated an SEC reviewing partner and, in that capacity, serves as concurring partner for a number of public companies throughout the U.S. A member of the American Institute of Certified Public Accountants, Larry received his B.S. in business administration from California Polytechnic State University at San Luis Obispo.

**11:00 am - 12:00 pm Role of Wellness in Employee Benefit Plans**

Health promotion and wellness can be key components in a well-designed health care strategy to control medical costs. Explore the role these can play in a consumerist environment. Building a culture of wellness, best practices and testimonials will be included to underscore the impact on employees and the bottom line.

**Peter J. Tavolacci**  
Principal  
Mercer LLC

Peter Tavolacci has more than 30 years of experience in employee benefits. He consults with various U.S. corporations on employee benefit programs, maintaining a focus on plan design and implementation, funding, financial analysis and on-going administration. Peter previously held senior positions with various Blue Cross and Blue Shield plans and was a consultant with the Blue Cross and Blue Shield Association. He holds a B.A. from Villanova University, an M.A. from New York University, and holds a Certified Health Consultant designation from Purdue University.

**12:00 pm - 1:30 pm Luncheon**

Sponsored by NCH Marketing Services, Inc.

**The Best Way to Predict the Future is to Create it**

In these turbulent, globally competitive times, innovation and resourcefulness are essential to survival. Find out how to become a victor of change instead of a victim. Gain a greater self-awareness as you learn to be driven by your values and purpose rather than circumstances and emotions. Create an environment that fosters creativity and team spirit. Feel better about yourself, your responsibilities and your role for the future.



**Scott Friedman**

After graduating from Southern Methodist University with a degree in marketing, Scott Friedman worked as marketing director for Duff's Smorgasbord, a national food chain. He moved on to other sales and marketing opportunities, becoming one of the top salespeople for AB Hirschfield Press for two and a half years. Scott entered public speaking as marketing director of SpeechMasters and became a full-time professional speaker in 1986. He is currently serving as the national president of the National Speakers Association.

**1:45 pm - 2:45 pm Business Session**

**Tim King**  
Senior Vice President/CFO  
Controller  
Brookshire Grocery Company  
(Session Chair)

**1:45 pm - 2:45 pm Threats and Opportunities in the Food Industry**

In the increasingly complex food retailing world, threats and opportunities exist in myriad issues—from competition and consumer demands to environmental awareness and food safety. Understanding the two sides of these issues is growing ever more important to moving your company off the status quo and ahead of the challenges of the day.



**Michael Sansolo**  
President  
Sansolo Solutions

During his 13 years as FMI's senior vice president, Michael Sansolo had oversight over all education, supply chain and research activities. Prior to joining FMI, he was editor-in-chief of *Progressive Grocer* magazine and was a reporter for Gannett Newspapers. In his career he received a number of awards for excellence in writing and reporting. He authored the magazine's "Annual Report of the Grocery Industry," along with many other major research-based studies. A contributing editor and a weekly columnist for MorningNewsBeat.com, Michael is a graduate of the State University of New York College at Cortland with a degree in political science, economics and journalism.

**2:45 pm - 3:00 pm Refreshment Break**  
Sponsored by APEX Analytix

**3:00 pm - 5:00 pm Breakout Discussion Groups**

Join assigned group to share experiences and exchange ideas (retailers and wholesalers only).

**6:00 pm - 7:30 pm Reception**  
Sponsored by Carolina Services

**TUESDAY, MAY 20**

**7:00 am - 8:00 am Breakfast**  
Sponsored by PHH First Fleet

**8:00 am - 11:00 am Business Session**

**James Flynn**  
Senior Vice President  
King Kullen Grocery Co., Inc.  
(session chair)

**8:00 am - 8:45 am Supermarket Pharmacy Operations**

In-store pharmacies represent a vital revenue source for food retailers. Find out the general state of pharmacy in supermarkets and get a first-hand view of how one retailer with multiple pharmacy units is coping with the barrage of changes required to do business in this very important area of the store.

**8:45 am - 9:15 am Washington Report**

Find out more about current legislative and regulatory issues on Capitol Hill and how they will impact the supermarket industry.

**9:15 am - 9:45 am Incentive Compensation Practices and Trends**

Learn how to develop a strategically-aligned reward system that is practical and manageable. Find out how to improve your reward system to build clarity and a focus on performance while helping attract, retain and engage talented people who can deliver on business strategy. Explore the current market trends and discover best practices of some of the "most admired" companies. Private vs. public company considerations will be addressed.

**9:45 am - 10:00 am Refreshment Break**  
Sponsored by APEX Analytix

**10:00 am - 11:15 am Am I the Leader I Need to Be?**

Most leaders have asked themselves this question at one time or another. Learn the 10 qualities all great leaders seem to possess. Measure your propensity to lead and get a push in the right direction to improve your leadership qualities. This session is ideal for anyone who has the need and desire to lead others, whether you're leading your church group, little league team or the people in the finance department.

**Harold C. Lloyd**  
President  
Harold Lloyd & Associates

Harold Lloyd is a graduate of the University of Pennsylvania Wharton School of Business and the University of Chicago Graduate School of Business. While serving as president of his stepfather's company, Lloyd's, which included 14 food retail outlets and 1,000 associates, he also taught business management and marketing at a local community college on a part-time basis. Harold left the family business and created his first seminar for a wholesaler in Memphis, TN, 21 years ago. In 1997, he wrote "It's About Time," a time management book to help business people find more time in their hectic lives to do the things that need to get done.

**11:15 am Adjournment**

# CONFERENCE INFORMATION

## Registration

Fax registration with credit card information to 202.220.0878 or mail the enclosed registration form with payment to Food Marketing Institute, P.O. Box 758884, Lockbox #758884, Baltimore, MD 21275-8884. To register online, go to [www.fmi.org/events/](http://www.fmi.org/events/), select Financial Executive Conference, click on "register online" and follow the instructions. Registration questions: contact Heather Cain 202.220.0815; hcain@fmi.org.

### REGISTRATION FEE

Includes all meetings materials, breakfast, coffee breaks, brunch, lunch and receptions. Fee does not include your hotel accommodations. Every participant – to qualify for FMI member rates – must be an employee of a FMI member company. Please remember an FMI member is either a retailer or wholesaler paying annual dues to FMI. An associate member is a supplier company paying annual associate membership dues to FMI. All others are non-members. Walk-in registrations accepted only if accompanied by payment of the registration fee in the form of cash, company check or credit card.

FMI Member: \$675.00 per person  
\$625.00 per person when three or more  
(paid) attend from the same company

FMI Associate Member: \$935.00 per person  
Non-Member: \$1,125.00 per person  
Companion: No registration fee

### CANCELLATION

Full refund if notification is received by May 9 (COB); 60 percent refund if less than one week's notification. NO REFUND IF NOTIFICATION IS RECEIVED AFTER MAY 16 (COB). IF REGISTRATION IS NOT CANCELLED BEFORE START OF MEETING, REGISTRANT WILL BE RESPONSIBLE FOR PAYING FULL REGISTRATION FEE.

### HOTEL RESERVATIONS

FMI does not arrange hotel accommodations; they should be made directly with the hotel. A block of sleeping rooms (\$219.00 single/double) will be held at the Arizona Biltmore Resort & Spa (2400 East Missouri Avenue, Phoenix, AZ 85016; 602.955.6600) for our attendees until April 25. Reservation requests received after this cutoff will be confirmed on an availability basis. All sleeping room accommodations are subject to applicable taxes.

If requested room rate is unavailable, one at the nearest rate will be reserved. Make your reservations directly with the hotel (602.955.6600 or 800.950.0086) and be sure to identify yourself as an attendee at this FMI meeting to receive this special rate. Reservations are subject to cancellation unless guaranteed by a major credit card or one night's deposit. Failure to cancel reservations 7 days prior to arrival will result in forfeiture of deposit. Check-in time is 4:00 pm; check-out time is 12:00 noon.

### CAR RENTAL

Avis Rent A Car is the official car rental provider for this meeting. Special discounts are available for all attendees and include unlimited free mileage. Call Avis at 1.800.331.1600 or log on to [www.avis.com](http://www.avis.com) to make your reservations. Be sure to mention discount code AWD # B235499. International attendees may fax their reservation requests to +1.918.621.4821.

### AIRLINE RESERVATIONS

FMI negotiated airfare discounts for attendees at this event. Please see the information below to take advantage of our special rates!

United Airlines offers special meeting discounts for attendees. Simply call (or have your travel agent call) United's Special Meeting Desk at 1.800.521.4041 and refer to Meeting ID Number 509RK to receive a 2–10 percent discount on applicable fares, including First Class. If you purchase a ticket at least 30 days prior to travel, you will receive an additional 5 percent discount. This special offer applies to travel on domestic flights of all United Airlines, United Express, TED and United code share flights (UA\*) operated by US Airways, US Airways Express and Air Canada.

### ATTIRE

Casual attire (no ties) is recommended for the entire conference. The average daytime temperature can be in the low 90s; falling to the low 60s in the evening.

### CONTINUING EDUCATION UNITS

The Food Marketing Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: [www.nasba.org](http://www.nasba.org).



The 58th Annual Financial Executive Conference is a "group-live" event at the advanced course level and no advanced preparation is required. Attendance at the entire conference earns a total of 18.5 CPE credits. 13.5 CPE credits in the Management Advisory Services field of study and 5.0 CPE credits in the Personal Development field of study. For more information regarding administrative policies such as complaints and refunds, please contact Ben Quigley (bquigley@fmi.org or 202.220.0716).

### PLANNING COMMITTEE

**Gino DiGrazia (Chair)**  
Publix Super Markets, Inc.

**Robert Dimond**  
Nash Finch Company

**SuzAnn Kirby**  
United Supermarkets, Ltd.

**Herb Dotterer**  
Big Y Foods, Inc.

**Rick Mills**  
Weis Markets, Inc.

**James Flynn**  
King Kullen Grocery Co., Inc.

**Pat Shinko**  
Food Marketing Institute

**Tim King**  
Brookshire Grocery Company



If you have any questions or need additional information, contact:

Pat Shinko or Ben Quigley  
Food Marketing Institute  
2345 Crystal Drive, Suite 800  
Arlington, VA 22202

**Telephone:** 202.452.8444  
**Fax:** 202.220.0877  
**E-mail:** [pshinko@fmi.org](mailto:pshinko@fmi.org)  
[bquigley@fmi.org](mailto:bquigley@fmi.org)