

**Financial Executives Conference**  
**Co-located with Internal Auditing Conference**  
**May 22-24, 2011**  
**Sheraton Hotel & Marina, San Diego, CA**  
**Agenda (updated May 2)**

*Please note that, while the FMI Financial Executive Conference adjourns on Tuesday, May 24, all attendees are welcome to join the sessions at the Internal Auditing Conference taking place on Wednesday, May 25<sup>th</sup>. Please see the Internal Auditing Conference agenda for more information.*

**SUNDAY, MAY 22**

- 3:30 p.m. – 4:30 p.m.      **COMMITTEE MEETING**
- 5:00 p.m. – 5:30 p.m.      **NEWCOMERS RECEPTION/ORIENTATION**
- 5:30 p.m. – 7:00 p.m.      **COCKTAIL WELCOME RECEPTION**  
*Sponsored by Inmar, Inc.*

**MONDAY, MAY 23**

- 7:00 a.m. – 8:00 a.m.      **BREAKFAST**  
*Sponsored by Connolly Consulting, Inc.*
- 8:00 a.m. – 8:15 a.m.      **CHAIRMAN'S OPENING REMARKS**  
*Paul Cox, CPA, Vice President, Finance, K-VA-T Food Stores, Inc.*
- 8:15 a.m. – 8:45 a.m.      **KEYNOTE ADDRESS: THE FOOD MARKETING INDUSTRY SPEAKS**  
  
Hear the latest research from FMI Speaks and Trends and state-of-the industry overview of economic, consumer and industry trends and their effect. Explore how key trends and emerging issues may develop and prepare to meet those challenges and exploit new opportunities for growth.  
  
*Pat Walsh, Senior Vice President - Education, Research & Industry Relations, Food Marketing Institute*
- 8:45 a.m. – 9:45 a.m.      **ACCOUNTING UPDATE**  
  
Understand the tidal wave of new accounting pronouncements rolling in over the next few years, including new accounting requirements for revenue, leases and financial instruments. Get an update on recent developments at the SEC and hear a discussion on the most frequent SEC comments received by companies in the food retailing industry.  
  
*Arie S. Wilgenburg, Partner, Deloitte & Touche LLP*
- 9:45 a.m. – 10:00 a.m.      **NETWORKING BREAK**  
*Sponsored by Lavante*

10:00 a.m. – 11:00 a.m.

**TAX UPDATE: What's New, What's Next...and What to Do about it NOW**

New tax legislation; new tax guidance – it's been a busy year. What does it all mean for financial executives? What were the significant tax developments this year and what are some of the emerging tax trends and tax policy debates? Find out what you need to know and gain insights as to what's to come in 2011 and beyond.

*Nancy C. Wertheim, National Tax Managing Partner, Retail Deloitte Tax LLP*

11:00 a.m. – 12:00 p.m.

**PROFIT 2011: REFOCUS AND RELOAD**

Shrink control means PROFIT. In this session you will: Learn how to make loss prevention a profit center, discover how grocery stores are taking bold, fresh action to drive financial performance, challenge your thinking and update your knowledge about performance metrics, identify the 12 standards for control of store shrink, hear the 5 in-store programs every financial manager should understand and measure to promote profitable selling at lower shrink levels and understand which Key Performance Indicators (KPI) are vital to your reporting portfolio

*Larry Miller, President, The Retail Control Group*

12:00 p.m. – 1:30 p.m.

**LUNCH WITH SPEAKER  
CHANGING OUR ATTITUDE: MOVING FROM SURVIVING TO THRIVING**

*Sponsored by NCH Marketing Services, Inc.*

Economic concerns, data security, regulatory challenges, healthcare uncertainties and consumer expectations have taken a toll on many professionals in the food retail industry, causing some to go into survival mode. It's time for a change in focus and attitude. Discover the secrets of 'can-do' leadership that will inspire your team members to strive for optimum performance, profitability and growth.

*Bruce S. Wilkinson, CSP- President, Workplace Consultants, Inc.*

1:45 p.m. – 2:45 p.m.

**BREAKOUT DISCUSSION GROUPS**

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

2:45 p.m. – 3:45 p.m.

## **DATA BREACHES: PATHS AND PREVENTION**

Do you know just how easily an unauthorized individual can gain access to your networks and sensitive data and remain undetected? Discover how corporate firewalls can be bypassed and how databases can be used to compromise host systems and corporate networks. Understand common weaknesses in Intrusion Detection Systems (IDS) and Intrusion Prevention Systems (IPS) configurations and learn about controls to protect your data.

*Kevin Nibler, Senior Manager, Security and Audit Services, Canaudit, Inc.*

3:45 p.m. – 4:00 p.m.

## **NETWORKING BREAK**

*Sponsored by Lavante*

4:00 p.m. – 5:00 p.m.

## **ACHIEVING BETTER OPERATING RESULTS VIA VENDOR COLLABORATION**

While retailer/vendor relationships will always be at arms length, a focus on Finance to Finance connections across company lines can yield relationship insights and operating benefits for both parties. Understand the key obstacles encountered in retailer/vendor collaboration and hear strategies for tackling them. Gain insight into what vendors expect of retailers and discover how both parties can work together to set mutual expectations. Learn best practices for measuring performance.

*Mike Jefvert, Managing Director, PRGX Advisory Services*

5:30 p.m. – 7:00 p.m.

## **COCKTAIL RECEPTION**

*Sponsored by PRGX*

## **TUESDAY, MAY 24**

7:00 a.m. – 8:00 a.m.

### **BREAKFAST**

*Sponsored by Ameriquest Transportation Services*

8:00 a.m. – 8:10 a.m.

### **WELCOME AND RECAP**

*Robert Walker, Chief Financial Officer, Associated Wholesale Grocers, Inc.*

8:10 a.m. – 9:00 a.m.

### **MERGERS & ACQUISITIONS: THE NEW WORLD ORDER**

Receive an overview of the current competitive landscape and lending environment as well as financial performance and merger and acquisition activity in the grocery industry, both in the retail and distribution sector. Stay current on issues facing other retailers nationwide and discover the strategies they have employed to successfully navigate through the current economic environment. Hear how your competitors are realigning operations to reduce overhead expenses and distribution costs. Explore ways to make similar tactical and strategic decisions that can improve your company's bottom line.

*David Schoeder, Principal, The Food Partners*

9:00 a.m. – 10:00 a.m.

### **THE FUTURE OF PAYMENTS: ARE YOU READY?**

How do companies gain an edge in the ever-evolving environment of consumer payments? Is your company ready for what's next? Understand how the latest legislative and technology trends, including mobile payments may impact the food industry. Discover what you can do to prepare. Learn how to approach payments strategically.

*Paul Cwalina, Senior Vice president, Supermarket and petroleum National Accounts, First Data*

*Joe Samuel, Senior Vice President – Global Affairs, First Data*

10:00 a.m. – 10:15 a.m.

### **NETWORKING BREAK**

*Sponsored by Balance Innovations*

10:15 a.m. – 11:15 a.m.

### **HEALTH CARE REFORM: BENEFITS AND COSTS, TODAY AND BEYOND**

The retail grocery industry is already paying more in health care costs than what is often reflected in the bottom line. Learn how changes mandated in the health care reform bill enacted in 2010 will further impact your business. Hear what companies are doing to proactively manage increasing costs in anticipation of changes required by the new law and discover potential methods for mitigating future cost increases. Gain insight into how company-provided health care might look when the entire program is rolled out.

*Brigen Winters, Principal, Groom Law Group, Chartered*

11:15 a.m. – 12:00 p.m.

## **HEDGING FOR RETAIL: A PRACTICAL APPROACH TO USING TOOLS TO REDUCE RISK**

Delve into the concept of commodity hedging through derivatives by exploring the logical reasoning and tools available to set up a hedging program. Understand the documentation and credit requirements necessary in order to get started.

*Peter Andersson, Vice President - Commodity Derivatives  
Société Générale Corporate and Investment Banking*

12:00 p.m. – 1:00 p.m.

## **LUNCH**

*Sponsored by Prologic Redemption Solutions*

1:00 p.m. – 2:00 p.m.

## **CREDIT MARKETS: RECOVERING, RELAXING, READY?**

Triggered by the housing debacle in 2008, the volatile credit market had a major impact on the global economy. As it regains strength, banks have recovered from the credit crisis and are eager to partner with successful businesses to fund programs at attractive rates. Learn how economic variables such as unemployment, inflation, the Federal Funds Rate, the value of the dollar, emerging markets, capital demand and commodities will continue to impact the credit markets and the U.S. and global economies. Discuss how the credit market is projected to perform this year and beyond.

*Martha Pruitt Mathews, Senior Vice President, JPMorgan Chase*

2:00 p.m. – 2:45 p.m.

## **ROUNDTABLES**

- Cloud Technology  
*Moderated by John Payne, Senior Vice President and Chief Information Officer, Associated Wholesale Grocers (AWG)*
- Deflation
- Back Office Convergence Solutions

2:45 p.m. – 3:00 p.m.

## **NETWORKING BREAK**

*Sponsored by Balance Innovations*

3:00 p.m. – 4:00 p.m.

### **PCI: PAST, PRESENT AND FUTURE**

The evolution of the PCI standard, mandatory for all retailers who process credit card transactions, poses time, resource and financial challenges on retailers. Follow the path to PCI compliance in this case study presented by a former Director of Internal audit at PETCO. Hear his perspectives on the role of the internal auditor in the compliance process and the internal and external risks that financial executives should be concerned about.

*Kevin Rigney, CISA, CISM, CISSP, Chief Information Security Officer, PETCO Animal Supplies, Inc.*

4:00 p.m. – 5:00 p.m.

### **EIGHT SLIPPERY SLOPES TO UNETHICAL BEHAVIOR**

Have you ever driven over the speed limit or perhaps downloaded music and not paid for it? If so, you know firsthand how hard it is to always stay within the law. This powerful business ethics presentation revolves around the thought processes that lead to unethical behavior. Kuhse uses his compelling life story to illustrate the eight critical thinking errors that lead to his becoming an international fugitive. Discussing each of these in-depth, he provides insight into common ethical dilemmas faced in business today.

*Patrick Kuhse, Internationally Recognized Business Ethics Authority*

6:30 p.m. – 9:30 p.m.

### **OFFSITE SOCIAL EVENT**

Join us for an unforgettable night under the stars! Step aboard the Adventure Hornblower yacht and take a 2 ½ hour sunset cruise around the San Diego Bay. Enjoy a delicious buffet and open bar while mingling with friends and business partners.

*Sponsored by Phyle Inventory Control Specialists*

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