

Financial Executive Forum Agenda

Ritz Carlton, Pentagon City | May 21-23, 2017

Last updated: May 16, 2017

SUNDAY, MAY 21

1:00 p.m. - 3:00 p.m.

U.S. Capitol Tour (optional) **SOLD OUT**

Sponsored By:

5:00 p.m. - 6:30 p.m.

Welcome Happy Hour

Sponsored By:



MONDAY, MAY 22

6:30 a.m. – 7:30 a.m.

BREAKFAST

7:30 a.m. – 8:30 a.m.

OPENING KEYNOTE

Essential Exchanges: What You Have to Give Up To Go Up

Kevin Paul Scott, Co-Founder of ADDO Worldwide, Business Builder and Author of "Eight Essential Exchanges"

Business means more than just products and services. Today, it's more important than ever for an organization to stand for something. Branding is what you tell the world you are; leadership is how you make it true. In this motivational and transformative session, Kevin will reveal how the most successful leaders make decisions, engage employees, and connect with customers using what he calls "Essential Exchanges" – what we gain by choosing between good things and even better things. Learn about the clear and challenging choices that confront us every day, and how making them will lead to greater personal and professional fulfillment and develop you as a leader.

CPE Field of Study: Personal Development

8:30 a.m. – 8:45 a.m.

NETWORKING BREAK

8:45 a.m. – 9:45 a.m.

GENERAL SESSION

The Economic Outlook for Retail Grocery in 2017 and Beyond: Peril or Prosperity?

Robert Genetski, Interest Rate Forecaster and Investment Banker

An unprecedented election has brought an air of uncertainty to the business world. What does a new administration and an unconventional President mean for the retail grocery industry in 2017 and beyond? Will retailers see a growth- and job-stimulating reduction in the business tax rate or face disruptive consumption tax system proposals? Will business tax reform bring gains or losses? What are the implications for global supply chains if trade deals such as TPP and NAFTA are dismantled? Could stagnant growth lead to increased M&A activity and will deflation continue to cripple food retailers? Join this session to get a realistic expert perspective on what to expect from the U.S. economy in 2017 and beyond so you can stay ahead of the curve.

CPE Field of Study: Economics

Session Sponsored by:



9:45 a.m. – 10:00 a.m. NETWORKING BREAK

10:00 a.m. – 11:00 a.m. ROUNDTABLE

An EMV Postmortem: The Good, The Bad and The Ugly

Facilitator: *Hannah Walker, Senior Director, Government Relations, Food Marketing Institute*

It's been over a year since the chip-card, or EMV deadline set by the major credit card brands went into effect. The grocery industry has spent hundreds of millions of dollars to become EMV enabled, yet many merchants are still struggling to migrate to the new system. Join FMI's government affairs and payments legislation expert to discuss issues such as chargebacks, EMV routing screens and customer confusion. Share your own challenges, frustrations and successes and find out what could be next in the world of credit card payments.

CPE Field of Study: Finance

10:00 a.m. – 11:00 a.m. ROUNDTABLE

Winning the War for Talent: Recruiting and Retaining Top Tier Talent in the Grocery Industry

Facilitator: *Kevin Paul Scott, Co-Founder of ADDO Worldwide, Business Builder and Author of "Eight Essential Exchanges"*

Recruiting and retaining the best talent can be difficult and costly in any industry. The labor-intensive supermarket industry faces its own unique set of challenges. Improvements in the economy along with decreases in unemployment mean higher turnover rates, the costs of which hit the bottom line. And the grocery industry continues to contend with its brand image problem, particularly among millennials. So, how do you win the war for talent? Join your peers in this facilitated conversation on the important decisions that retailers face to effectively recruit and retain employees. Discuss and share best practices for attracting top tier talent and for creating an environment where employees are prepared, passionate, purposeful and in which they'll want to stay.

CPE Field of Study: Personnel/Human Resources

11:00 a.m. – 11:15 a.m. NETWORKING BREAK

11:15 a.m. – 12:15 p.m. GENERAL SESSION

Boosting the Bottom Line with a Proactive Approach to Tax Credits and Business Incentives

Rose Burden, Executive Director Southeast Incentives Leader, Indirect Tax Services, Ernst & Young LLP

Benton Blaine, Manager, Location Investment Services, Ernst & Young LLP

As food retailers continue to face an increasingly competitive business environment, the importance and role of tax credits and business incentives (C&I) in maintaining profitability is growing. To optimize the use of C&I, financial executives must first have a clearer picture of the opportunities available and the benefits they provide. This overview of C&I will examine the types of incentives available, both at the state and local level, explain what triggers them and define who can take advantage of them. Learn about current incentive trends in the food retail industry and best practices for identifying, evaluating and optimizing the opportunities available. Relevant case studies will help you discover how C&I can be applied in your own company to positively impact the bottom line and give you competitive advantage.

CPE Field of Study: Management Service

12:15 p.m. – 1:15 p.m.

LUNCH

Sponsored by:



1:15 p.m. – 2:15 p.m.

GENERAL SESSION

The Economic Realities of Omnichannel Retailing

Thom Blischok, Chairman & CEO, The Dialogic Group, LLC.

Digital technology has profoundly and irreversibly reshaped the overall retail landscape, transforming the way consumers shop. Today's consumer expects to be able to buy anything, anywhere, anytime using a digital device. Omnichannel retailing is here to stay and retailers face the economic reality that they must embrace and integrate it in order to survive. But what are the financial implications needing consideration when implementing an Omnichannel strategy? What types and levels of capability investments are necessary, what are the risks and returns, and what challenges will retailers face going forward in their digital journeys?

Our session is designed to discuss the key issues, opportunities and roadblocks to the most challenging transformation of retail as we know it today.

CPE Field of Study: Management Services

Session Sponsored by:



2:15 p.m. – 2:30 p.m.

NETWORKING BREAK

2:30 p.m. – 3:45 p.m.

IDEA EXCHANGE (Retailer & Wholesaler Only)

Join in a lively discussion about the issues and challenges that keep financial executives in the food retail business up at night. Get ideas, swap best practices, share your pain points and connect with your finance peers during our most popular session.

3:45 p.m. – 4:00 p.m.

NETWORKING BREAK

4:00 p.m. – 5:00 p.m.

The Big Picture: An Update on the Financial Markets and Food Retail Landscape

Facilitator: *Scott Moses, Managing Director Head- Food Retail & Restaurants Investment Banking*

Get an overview of the key financial and the strategic developments currently under discussion in food retail boardrooms. Learn which factors food retail financial executives could incorporate into their strategic and financial projections calculus and discuss operational benchmarking, relative valuation and the prospective shifts in the food retail M&A landscape.

Learning Objectives:

- Incorporate strategic and financial factors into projections
- Incorporate operational benchmarking into strategic and financial calculus
- Incorporate financial markets trends into capital planning process

CPE Field of Study: Finance

5:00 p.m. – 6:30 p.m.

HAPPY HOUR

Sponsored by:



6:30 a.m. – 7:30 a.m.

BREAKFAST

7:30 a.m. – 9:00 a.m.

GENERAL SESSION

Data Breach Readiness and Response in a “When Not If” World

Kris Kleiner, Associate, Norton Rose Fulbright LLP.

Andy Obuchowski, Vice President, Global Forensic & Cyber Investigations, Charles River Associates

Jim Buhr, Vice President, CFO and CIO, Bashas’ Inc.

Like it or not, it’s just a matter of time before your organization experiences a data breach. Since 2005, more than 4,500 data breaches have been made public and more than 816 million records breached. Are YOU prepared for the inevitable? Readiness is prudent, but not dealing with the inevitability of an event could be considered reckless. Join a panel of cyber security experts to discuss best practices for preparing for, mitigating and responding to a data breach and hear from retailers who have experienced a breach on what compliance challenges they faced. Share your own cyber security and compliance challenges and take home practical advice on developing a documented data breach response plan.

CPE Field of Study: Information Technology

9:00 a.m. – 10:00 a.m.

GENERAL SESSION

Accounting and Financial Reporting 2017 and Beyond: What Financial Executives Need to Know

Bill Park, Partner, Deloitte & Touche LLP

What accounting and financial reporting changes are coming down the pipeline in 2017 and how will they impact the food retail industry? Attend this session to get an up-to-the-minute report on FASB’s latest accounting standards and make sure you’re in compliance.

CPE Field of Study: Accounting

10:00 a.m. – 10:20 a.m.

NETWORKING BREAK

10:20 a.m. – 11:20 a.m.

ROUNDTABLE

Labor Regulation and Legislation in the Food Retail Sector

Facilitator: *Dana Mullen, Regulatory Counsel, Food Marketing Institute*

Alfred B. Robinson, Jr., Shareholder, Ogletree Deakins

Discuss pending labor regulations impacting the food retail sector with FMI’s legislative expert including overtime, minimum wage, worker classification, scheduling requirements, workers comp and other issues of interest to financial executives.

CPE Field of Study: Business Law

- 10:20 a.m. – 11:20 a.m. ROUNDTABLE**
Improving Business Predictability with Budgeting, Planning and Forecasting Solutions
***Facilitator:** Sarah Bevers, Senior Financial Analyst, United Supermarkets LLC.*
- With increased competition in the industry, deflation and other external factors, accurately projecting future performance can be complex. What technology and tools are available to assist in this process? What methods can you use to measure actual to anticipated results to review your assumptions and make adjustments moving forward? Discuss these and other issues related to projections and trending future performance.
- CPE Field of Study: Finance*
- 11:20 a.m. – 11:30 a.m. NETWORKING BREAK**
- 11:30 a.m. – 12:30 p.m. GENERAL SESSION**
Improving Profit Margins through Enhanced Vendor Performance Visibility
***Panel Facilitator:** Steve Schmitchel, Vice President, Business Development and Program Management, Topco Associates, LLC.
 Scott Frost, Senior Vice President, CFO and Treasurer, Weis Markets, Inc.
 Michael Lockard, Senior Vice President and CFO, K-VA-T Food Stores, Inc.
 Kyle McCoy, Executive Vice President-Chief Financial Officer, Brookshire Grocery Company*
- Without a clear picture of vendor performance, grocers must rely on vendor information, which puts them at a negotiating disadvantage. In this session, you'll learn how other grocery retailers have been able to increase their negotiating power using a proven methodology to assimilate procure-to-pay transaction data from disparate systems to provide on-demand visibility of vendor performance, P&L, trade funds and net cost down to item level. Discover how to improve your margins using data driven insights that allow for fact based vendor negotiations and collaboration.
- CPE Field of Study: Finance*
- 12:30 p.m. – 1:30 p.m. LUNCH**
- 1:30 p.m. – 2:45 p.m. IDEA EXCHANGE (Retailer & Wholesaler Only)**
- Join in a lively discussion about the issues and challenges that keep financial executives in the food retail business up at night. Get ideas, swap best practices, share your pain points and connect with your finance peers during our most popular session.
- 2:45 p.m. – 3:00 p.m. NETWORKING BREAK**
- 3:00 p.m. – 4:00 p.m. GENERAL SESSION**
The View From The Hill
- With the first 100 days of the new administration behind us, get an insider's perspective of what's happening on Capitol Hill and hear how a Republican-led Congress and White House is likely to shape our industry in the coming years.

CONTINUING EDUCATION CREDITS

Attend the 2017 Financial Executive Forum and earn up to 15 CPE credits in fields of study such as Business Law, Economics, Personnel/HR, Personal Development, Information Technology and Accounting. The 2017 Financial Executive Forum is a "group-live" event at the advanced course level and no advanced preparation is required.

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