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# 2026 AUSTIN AFP FALL CONFERENCE

**ELEVATE YOUR TREASURY EXPERTISE**

**Wednesday, September 23, 2026**

7:45 AM Check-in | 8:00 AM Breakfast

Maggiano's Little Italy - The Domain

Austin, Texas

Six sessions | Networking | Up to 6.5 continuing education credits

# WHY ATTEND?

## A day built for financial professionals.

Austin AFP brings together treasury and finance professionals for practical education, emerging trends, and meaningful peer connections.

### EXPERT SPEAKERS

Learn from experienced leaders across banking, technology, advisory, cybersecurity and treasury.

### ACTIONABLE INSIGHTS

Take practical ideas back to your organization.

### EARN CREDITS

Up to 6.5 CTP/CPE credits available.

### PROFESSIONAL NETWORKING

Build valuable relationships with peers and partners.

This conference is designed for treasury, finance, accounting, banking, payments, risk and related professionals.

# CONFERENCE AT A GLANCE

Six timely sessions. One focused day.

|               |                                                                              |
|---------------|------------------------------------------------------------------------------|
| 8:45 - 9:35   | <b>The Next-Gen Deposit Playbook</b><br>Tokenized Deposits & Stablecoins     |
| 9:55 - 10:45  | <b>The Liquidity Multiplier</b><br>Unlocking Working Capital with Surety     |
| 11:05 - 11:55 | <b>Cyber Decisions &amp; Actions</b>                                         |
| 12:25 - 1:15  | <b>Beyond the Payment</b><br>Unlocking the Hidden Power of Procure-to-Pay    |
| 1:35 - 2:25   | <b>MythBusters</b><br>Bank and Merchant Fee Edition                          |
| 2:40 - 3:55   | <b>The Finance Talent Forecast</b><br>2027 Salary, Skills & Workforce Trends |

|                                        |                                    |
|----------------------------------------|------------------------------------|
| <b>MEMBERS</b><br><b>COMPLIMENTARY</b> | <b>NON-MEMBERS</b><br><b>\$175</b> |
|----------------------------------------|------------------------------------|

Registration includes breakfast, lunch, refreshments, educational sessions and networking.

## SESSION 1

# THE NEXT-GEN DEPOSIT PLAYBOOK

## A Guide to Tokenized Deposits and Stablecoins

8:45 - 9:35 AM

**Dean Jenkins**, Principal Digital Strategist, Q2

**Alex Keene**, TM Digital Product Manager, SouthState Bank

**Moderator: Margie Petru**, SVP Treasury Solutions Officer, SouthState Bank

SouthState and Q2 will provide financial-institution and technology-provider perspectives on stablecoins and tokenized deposits - what they are, why they matter, and how organizations should evaluate opportunities, risks and business implications.

## KEY TAKEAWAYS

- Practical use cases for wallets, deposit tokens and stablecoin-enabled payments
- Key risk, compliance and operational considerations
- Cost, return and business-case considerations
- Deposit strategy, client experience and readiness

9:35 - 9:50 AM | 15-minute break

## SESSION 2

# THE LIQUIDITY MULTIPLIER

## How Treasurers Unlock Working Capital with Surety

9:55 - 10:45 AM

**Gagan Sivia, CPA, CGA**, Assistant Vice President, Enterprise Commercial Practice, Rosenberg & Parker Surety

**Chad Rosenberg**, Principal, Rosenberg & Parker Surety

Learn how surety bonds can sit alongside - or in place of - traditional letters of credit and bank guarantees to create additional liquidity from existing structures without adding on-balance-sheet debt.

### KEY TAKEAWAYS

- Unlock working capital from existing LC and guarantee portfolios
- Preserve and expand bank credit capacity
- Identify quick-win opportunities where surety may improve liquidity metrics
- Reduce dependence on cash collateral and potentially reduce cost
- Strengthen treasury's role in risk mitigation and strategic decision-making

10:45 - 11:00 AM | 15-minute break

### SESSION 3

# CYBER DECISIONS & ACTIONS

11:05 - 11:55 AM

**Aaron Alviso**

Executive Director, Senior Cyber Engagement Lead  
Wells Fargo Bank

Step into a realistic cyber-fraud scenario where every decision matters. Through live polling and expert guidance, attendees will navigate a sophisticated business email compromise targeting accounts payable.

Sharpen your ability to recognize social engineering, verify payment changes, respond quickly to suspected fraud, and strengthen your organization's human firewall.

11:55 AM - 12:25 PM

**LUNCH & NETWORKING**

Connect with peers before the afternoon program.

## SESSION 4

# BEYOND THE PAYMENT

## Unlocking the Hidden Power of Procure-to-Pay

12:25 - 1:15 PM

**Justin Guerra**, Senior Vice President, Treasury & Capital Markets, Kaufman Hall  
**Marko Adams**, Assistant Vice President, Treasury & Capital Markets, Kaufman Hall

Building a best-in-class payables operation requires more than efficient payment execution. This session breaks down procure-to-pay and provides a practical framework for transforming the payables function.

### SESSION FOCUS

- Assess and redesign workflows
- Align functional groups around shared goals
- Evaluate the technology ecosystem supporting operations
- Improve efficiency, security and strategic alignment across payables

1:15 - 1:30 PM | 15-minute break

# AFTERNOON SESSIONS

## SESSION 5

### MYTHBUSTERS: BANK AND MERCHANT FEE EDITION

**1:35 - 2:25 PM**

**Bridget Meyer**, Senior Relationship Manager, Redbridge Debt & Treasury Advisory

Join an interactive session that debunks common treasury myths surrounding bank and merchant fee analysis.

2:25 - 2:40 PM | 15-minute break

## SESSION 6

### THE FINANCE TALENT FORECAST

**2027 Salary, Skills & Workforce Trends**

**2:40 - 3:55 PM**

**Judy Hernandez, CPA, Practice Director, Assistant Vice President, Robert Half**

The finance and accounting talent landscape is changing as organizations balance compensation pressures, technology transformation and growing demand for specialized expertise. Judy will share insights from Robert Half's 2027 Salary Guide and explore the workforce trends finance leaders should be watching.

#### KEY TAKEAWAYS

- 2027 compensation trends and high-demand finance roles
- How AI, automation, analytics and ERP expertise are reshaping talent needs
- Skills and certifications that may increase earning potential
- Total rewards strategies for attracting and retaining finance professionals

**3:55 - 4:00 PM**

**CONFERENCE CLOSING**

# EVENT DETAILS

|           |                                                            |
|-----------|------------------------------------------------------------|
| CHECK-IN  | 7:45 AM                                                    |
| BREAKFAST | 8:00 AM                                                    |
| WELCOME   | 8:30 - 8:45 AM                                             |
| PROGRAM   | 8:45 AM - 3:55 PM                                          |
| CLOSING   | 3:55 - 4:00 PM                                             |
| LOCATION  | Maggiano's Little Italy, The Domain                        |
| ADDRESS   | 10910 Domain Dr., Austin, TX 78758                         |
| PARKING   | FREE covered parking in the Domain Northside - Blue Garage |
| CREDITS   | Up to 6.5 continuing education credits                     |

## PARKING TIP

Attendees can park free in the covered Domain Northside - Blue Garage, making arrival easy regardless of the weather.

# MEET THE SPEAKERS

Industry experience. Practical perspective.



**Dean Jenkins**

**Principal Digital Strategist, Q2**

Dean works with financial institutions to develop digital strategies aligned with growth objectives. He has focused on digital banking for the past two decades in product and development leadership roles at banks and FinTech companies. Since joining Q2 in 2018, he has helped launch digital products and establish product strategies aligned with market needs.



**Alex Keene**

**TM Digital Product Manager, SouthState Bank**

Alexandra (Alex) Keene specializes in treasury management and payment solutions. With more than 30 years of industry experience, her expertise spans product management, sales, operations and payment fraud prevention. She holds a bachelor's degree in economics from Southwestern University and a master's in project management from George Washington University, and contributes thought leadership on cybersecurity training, fraud prevention, payments and treasury management.

# MEET THE SPEAKERS

Industry experience. Practical perspective.



## Gagan Sivia, CPA, CGA

**Assistant Vice President, Enterprise Commercial Practice, Rosenberg & Parker Surety**

Gagan Sivia, CPA, CGA, CFP is Assistant Vice President, Commercial Practice at Rosenberg & Parker and a faculty member at the British Columbia Institute of Technology. Her career spans FP&A; leadership, commercial finance, real estate development, data analytics and finance transformation, with extensive experience turning complex financial information into strategic business decisions.



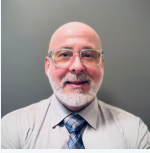
## Chad Rosenberg

**Principal & COO, Rosenberg & Parker Surety**

Chad Rosenberg oversees client and surety relations as well as marketing and technology. With more than 30 years of experience as a surety broker and underwriter, he serves public and private companies across numerous industries. A recognized speaker on surety topics, he has presented to RIMS chapters, RISKWORLD, associations, corporations and government agencies. He earned a B.A. in English Literature from the University of Virginia.

# MEET THE SPEAKERS

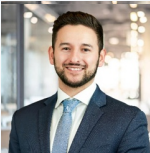
Industry experience. Practical perspective.



## Aaron Alviso

**Executive Director, Senior Cyber Engagement Lead, Wells Fargo Bank**

Aaron serves on Wells Fargo's Cyber Client Advisory team within Cyber Human Defense | Information Security. He leads strategic threat research, tailored cyber threat briefings and cybersecurity awareness. Previously, he spent eight years on Wells Fargo's Cyber Threat Intelligence team, more than ten years with the FBI supporting national security and criminal investigations, and served two combat deployments as a U.S. Army intelligence analyst. He also teaches Cyber Defense at Alamo Colleges.



## Justin Guerra

**Senior Vice President, Treasury & Capital Markets, Kaufman Hall, a Vizient Company**

Justin is a Senior Vice President in Kaufman Hall's Treasury & Capital Markets Practice, providing analytical, quantitative and strategic support to higher education institutions and not-for-profit hospitals and health systems. He focuses on innovative treasury solutions, operational efficiency, financial performance and risk mitigation. Previously, he served as a Vice President Treasury Management Officer at J.P. Morgan Chase & Co.



## Marko Adams

**Assistant Vice President, Treasury & Capital Markets, Kaufman Hall, a Vizient Company**

Marko is an Assistant Vice President in Kaufman Hall's Treasury & Capital Markets practice, focused on data-driven treasury processes, operational enhancement, optimization and integration. Previously, he was a Treasury Sales Associate at J.P. Morgan's Global Corporate Banking group, delivering cash-management and working-capital solutions to healthcare clients nationwide. He earned a B.A. in Economics from DePauw University.

# MEET THE SPEAKERS

Industry experience. Practical perspective.



## Bridget Meyer

Senior Relationship Manager, Redbridge Debt & Treasury Advisory

Bridget covers the Southeast market for Redbridge and is a regular speaker at AFP national and regional conferences. An internationally recognized expert on bank fee reporting, she facilitates the SWIFT CGI-MP Working Group 5 focused on the ISO 20022 bank fee file format (camt.086). She has spent more than 20 years improving bank fee reporting, co-authoring the AFP Global Service Codes and helping treasury teams turn bank, merchant and FX fee data into a strategic tool.



## Judy Hernandez, CPA

Practice Director, Assistant Vice President, Robert Half

Judy is an accounting and finance professional with more than a decade of experience in financial leadership, technical accounting, team management and business operations. As Practice Director - Management Resources with Robert Half in Austin, she connects organizations with experienced accounting and finance professionals. She earned her bachelor's degree in accounting from the University of New Mexico, is a CPA, and serves on the Austin CFO Leadership Council Board.

# THANK YOU TO OUR SPONSORS

Supporting treasury education and professional connections





# INVEST ONE DAY. BENEFIT ALL YEAR.

Learn. Connect. Grow.

**WEDNESDAY, SEPTEMBER 23, 2026**

Maggiano's Little Italy - The Domain  
Austin, Texas

**FREE COVERED PARKING**  
Domain Northside - Blue Garage

**Members: Complimentary**  
Non-Members: \$175

**AUSTINAFP.ORG**