

# FINANCE IN THE RESET ECONOMY ...NOW WHAT?

# NFA

1st Annual **National  
Conference**

National Funding Association

3 days of  
**Networking, Referral  
Building & Education**

**May 4 - 6th, 2011**

The Grand Hyatt Hotel  
Atlanta, Georgia

Special Thanks to Our Sponsors





1st Annual **National  
Conference**

National Funding Association

## Finance in the Reset Economy... Now What?

Attend NFA's 1st Annual National Conference

**Network with Hundreds of Financial Professionals & Learn from Today's Leading Financial Experts and Thought Leaders:**

- ☒ What the Future Holds for our Industry; and
- ☒ How to Leverage that Knowledge to Compete and Excel in this New Economy

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### SPEAKERS INCLUDE:

**President of Atlanta  
Federal Reserve Bank**  
Dennis Lockhart

**Governor of Georgia**  
Nathan Deal

**Mayor of Atlanta**  
Kasim Reed

**Founder of Midas Nation**  
Rob Slee

**Consumer Strategist**  
Richard Hastings

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**Charles Green** – Small Business Finance Institute

**Greg Hays** – Hays Consulting

**Kenneth Marks** – High Rock Partners

**Sean Nelson** – Social Media Sonar

**Nancy Halwig** – UPS Capital

**Rob Liano** – Rock Star Sales Training

**Mark your Calendar NOW! – May 4 – 6, 2011**

Join us for 3 Days of Powerful Networking and Education  
that will Empower you to Compete and Excel in this New Economy!

**Space Limited!** Visit <http://nationalfunding.eventbrite.com> for more information and to secure your spot.



## Meet our Speakers



### **Dennis Lockhart**

**President & CEO, The Federal Reserve Bank of Atlanta**

Dennis P. Lockhart took office March 1, 2007, as the 14th president and chief executive officer of the Federal Reserve Bank of Atlanta. In this role, Lockhart is responsible for all of the Bank's activities, including monetary policy, bank supervision and regulation and payment services. In addition, he serves on the Federal Reserve's chief monetary policy body, the Federal Open Market Committee (FOMC).



### **Nathan Deal**

**Governor of Georgia**

Governor Deal's career includes 23 years in private law practice. His public service includes his work as a criminal prosecutor and juvenile court judge, 12 years in the state Senate and nine terms in the U.S. Congress. His colleagues in the state Senate elected him president pro tem, the highest-ranking senator. In Congress, Governor Deal served as chairman and ranking member of the Subcommittee on Health. He was known on Capitol Hill as an expert on healthcare issues and led the Republican fight against Obamacare. He was elected on Nov. 2 as the 82nd Governor of Georgia.



### **Kasim Reed**

**Mayor, The City of Atlanta**

Mayor Kasim Reed was inaugurated as the City of Atlanta's 59th Mayor on January 4, 2010. Since taking office, Mayor Reed has worked to improve public safety, create new opportunities for the City's youth, restore fiscal stability to the city and provide faster and more efficient customer service to its residents. Prior to his election, Mayor Reed established a track record of leadership during his 11 years as a member of the Georgia General Assembly. He was first elected in 1998 as a State Representative and served two terms.



### **Rob Slee**

President of Robertson and Foley

**Presenting:** *"How Crowdsourcing Will Save the Nation"*

Rob Slee is Founder of MidasNation, a community dedicated to helping business owners dramatically increase the value of their firms. Rob has authored more than 250 articles on private finance topics in a variety of legal and business journals. Rob's book, *Private Capital Markets*, was published in mid-2004 by John Wiley & Sons and is now considered the seminal work in finance for private companies. Law schools and MBA programs around the world use this book in a new course of the same name. A second edition of this book will be released in June, 2011.

Rob's second book, *Midas Managers*, was released in 2007 and describes how super-successful private business owners create substantial wealth in a global economy. Rob's current book, *Midas Marketing: How Midas Managers Make Markets*, was released in March, 2009.



### **Richard Hastings**

Global Hunter Securities

**Opening Session Speaker -** *"The Mechanics of Gas Inflation - From Katrina to the Crash and Beyond"*

Richard Hastings is the Consumer Strategist for investment bank Global Hunter Securities, LLC, where he provides industry level research into consumer and retailing, real estate, capital markets and forex, and investment strategies. Richard is a member of the board of directors of the National Funding Association in Charlotte and is also on the board of the Chartered Financial Analysts (CFA) North Carolina Society.

He has more than twenty years of experience in commercial credit and industry research, and he is a Certified Credit Executive with the National Association of Credit Management. Richard is a frequent guest on CNBC.



**Charles H. Green**, Small Business Finance Institute

***"Short Change - A New Paradigm in Small Business Finance"***



Charles Green serves as Executive Director of the Small Business Finance Institute. He is a small business financing expert with more than 30 years experience advising entrepreneurs. He founded and served as President of Sunrise Bank of Atlanta, after 25 years in banking and venture capital. He has authored five finance books, and has been interviewed by many major media outlets about small business financing. In 2005, he was named the Financial Services Champion of the SBA's Georgia District.

Charles earned a Bachelor's degree in Finance from the University of Alabama and completed the Stonier National Graduate School of Banking. He has served on several corporate boards and presently serves as director of the Atlanta Medical Center.

**Nancy Halwig**, UPS Capital

Panel Moderator - ***"State of the Lending Industry"***



Nancy is a Managing Director with UPS Capital in the Global Supply Chain Finance Group. GSCF originates senior committed asset-based capital facilities by leveraging the information and control of finished goods inventory as it flows through UPS bonded logistics warehouses and ocean or air freight containers in their country of origin, and in transit from Asia and elsewhere. In addition, customized financing solutions can be created to arbitrage the risk premiums between various parties in the global supply chain, as well as US export financing.

With more than 35 years in the financial services industry, Nancy has held several senior management positions since moving to Atlanta 25 years ago. Her extensive lending and leadership experience includes: Managing Director, RBS Capital; Managing Director, DoveBid Valuation Services; Senior Vice President, Wachovia Capital Finance; Senior Vice President, Legacy Bank of America; Regional Vice President for KBC in addition to a decade of various corporate lending positions with Citicorp.

**Kenneth Marks**, High Rock Partners

***"What's Next for Middle Market M&A?"***



Kenneth is the Founder and Managing Partner of High Rock Partners and the lead author of the Handbook of Financing Growth: Strategy, Capital Structure and M&A Transactions. His firm creates value by working with the leaders of emerging growth and middle-market companies through transitions of ownership, transitions to the next level or to reposition the company using a unique and proven blend of experiences and tools in strategic management, mergers & acquisitions, finance and deals, organizational alignment, technology launches, globalization and lean operating systems...coupled with a been-there-done-that confidence.

Marks' past positions include President of JPS Communications, Inc. - a fast growth technology subsidiary of the Raytheon Company - and President and CEO of an electronics manufacturer that he founded and grew to \$22 million. He was a director for a Research Triangle area investment bank focused on raising capital during the late 1990's.

### **Rob Liano, Rock Star Sales Training**

#### ***“How to Be a Sales Rock Star”***



Rob Liano, the Rock Star Sales Trainer, is a best selling author and renowned sales & success coach. As a teenager he started selling vacuum cleaners, learning from his mentor and friend, his Father Joe. The “old school” sales lessons he learned have stuck with him throughout his entire career, which has spanned over 20 years.

Rob has forged new techniques to create an innovative and non-failing system of selling. His effectiveness is not a secret and he’s sharing it with the world, whether on stage or a single phone call. Once you realize that in this technological era of instant gratification, many old school techniques just don’t cut it any more, you’ll realize that Rob Liano’s modern, cutting edge, easy to implement sales insights will simplify your sales life and take your career to the next level!

### **Sean Nelson, Social Media Sonar**

#### ***“Generating Leads through Social Media”***



Sean Nelson writes the Social Media Sonar blog, one of the top blogs discussing Social Media strategies and tactics. In 2009 the blog was the winner of Blog Off 2, an international blogging contest. He has been a Keynote speaker at Norvax University, conducts social media workshops and webinars, has released three eBooks on LinkedIn and written several social media guides.

He is the founder of Social Media Sonar, an online marketing and social media firm that develops online marketing strategies incorporating social media. He is also a founding partner in Surge Labs, a conversion rate optimization company which helps companies improve conversions and profitability through scientific testing of landing pages, websites, shopping carts, email, and pay-per-click campaigns.

### **Greg Hays, Hays Financial Consulting**

#### ***Panel Moderator – “The Art and Science of the Workout”***



Mr. Hays has been involved in a broad array of financial consulting engagements, primarily focused on restructuring and winding down insolvent companies and investigating fraud. He is routinely appointed by federal and state courts as Trustee or Receiver to manage businesses and other assets in an effort to maximize recovery for creditors and investors.

Mr. Hays has been quoted in *The Wall Street Journal*, *Business Week*, *Bloomberg.com*, *Forbes.com*, *Wired Magazine*, *Palm Beach Daily News*, *The Atlanta-Journal Constitution* and *The Atlanta Business Chronicle* in connection receiverships and Ponzi schemes including issue regarding the Madoff and Stanford fraud cases. In February 2009 the TV show *American Greed* featured a story on a Ponzi scheme case where he served as receiver. In prior years, news articles regarding the cases in which he has been involved have appeared in *The Wall Street Journal*, *Money Magazine*, *Barron's*, *Business Week*, *The Washington Post* and *Sports Illustrated*. Some of his cases have been the subject of TV broadcasts on CNN's Anderson Cooper and the CBS Evening News.





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**Founded in 1991, The National Funding Association** is the premier financial networking organization in the country. With nine chapters serving twelve metropolitan areas, the NFA connects networking financial professionals across America and continues to grow, expand and empower its members to succeed. Our members include asset-based lenders, factors, investment bankers, attorneys, CPA's, bankers, consultants, brokers, and other financial professionals.

## **Agenda**

### **WEDNESDAY / MAY 4, 2011**

**9:30 am – 3:00 pm** NFA Golf Tournament – *The Trophy Club of Georgia*

**5:00 pm – 8:00 pm** Registration

**6:00 pm – 8:00 pm** Opening Reception Networking & Cocktail Party

### **THURSDAY / MAY 5, 2011**

**8:00am – 12:00pm** Registration

**8:30 am – 9:45 am** Opening Session

**9:45 am – 10:30 am** Networking Break, Exhibits Open for the Day

**10:30 am – 11:30 am** Breakout Workshop Sessions

**11:30 pm – 12:00 pm** Networking Break

**12:00 pm – 1:30 pm** Luncheon with Key Note Speaker

**2:00 pm – 3:00 pm** General Session

**3:00 pm – 3:30 pm** Networking Break

**3:30 pm – 4:30 pm** Breakout Workshop Sessions

**4:30 pm – 4:45 pm** Networking Break

**4:45 p.m. – 5:45 pm** General Session

**6:00 pm – 7:00pm** Cocktail Party

**7:00 pm – 9:00 pm** Dinner and Entertainment

### **FRIDAY / MAY 6, 2011**

**8:30 am – 11:00 am** – NFA National Planning Sessions for NFA Officers, Board Members, Chapter Officers, Board Members, Committees and All Attendees.



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## Registration & Event Details

**(Member)**  
\$375.00 before April 15  
\$450.00 after April 15

**(Non-Member)**  
\$475.00 before April 15  
\$550.00 after April 15

### Price Includes Meals and Cocktails

(Space Limited) **REGISTER HERE** - <http://nationalfunding.eventbrite.com>

### Hotel and Event Location:

Our First Annual National Conference will be held on May 4-6, 2011 at the elegant Grand Hyatt Hotel in Atlanta, Georgia! The Grand Hyatt is set in the upscale neighborhood of Buckhead, and offers spacious guest rooms and deluxe amenities. The Hyatt is surrounded by many area attractions, including the World of Coca-Cola Museum, the Georgia Aquarium and luxury shopping at Lenox Square and Phipps Plaza.

The Grand Hyatt Hotel has offered NFA Conference Attendees a very special hotel rate of only \$159 per night! That's about \$100 less than their normal rates. This is a fantastic deal for a luxury hotel in Buckhead - about the same amount you would pay for a stay at a Courtyard or a Hampton in the same area. Reserve your room here <https://resweb.passkey.com/go/NFA>

*Grand Hyatt Atlanta*  
3300 Peachtree Rd NE  
Atlanta, GA 303053  
Tel: 404-577-1234 Fax: 404-588-4137

### Airfare

AirTrans has offered NFA Attendees a Special Discount of 10% off their airfare. To take advantage of this offer, you must call 1 866-683-8368 and use discount code **ATL050411** when booking your flight.

### Register Now! Space is Limited

Join hundreds of financial movers and shakers, catch up on industry developments and trends and energize your new business efforts in 2011!