



# CFO

## Working Group

September 23, 2020 • Noon - 3:00 pm EST • Conference Call

### Call in Information - [CLICK TO JOIN](#)

Dial In Number                      646.357.3664  
Meeting ID                              148 663 1809

### Agenda

- Noon – 12:10 p.m.                      **Opening Remarks**  
*Ce Harrison, CFO, The Council, Denise Tapp, Director, Financial Projects, Oswald; Jake Shafer, CFO, The Partners Group, and Pete Hendrick, CFO, Propel Insurance*
- 12:10 – 12:30 p.m.                      **Capitol Hill Update**  
*Government Affairs Team, The Council*
- Thoughts on the 2020 Election
  - Legislative Update
- 12:30 – 1:00 p.m.                      **Investment Market and Economic Update**  
*Shawn Halsey, SVP, Merrill Lynch*
- 1:00 – 3:00 p.m.                      **Roundtable Topics – On Ring Central – we will switch to Remo Room at some flex point as determined by the group during the call\***
- 2021 Budgeting and Planning – Assumptions CFOs are using to build 2021 plan for personnel, growth, rates, travel, entertainment, technology, other
  - Operational Initiatives
    - Virtual Pivots
    - Remote Working Experiences
    - Technology Enablers
    - Business Process Improvements/Changes, both internal and client facing
    - Back to the Office – Gains/Pains
    - New In-Office Protocols
    - PPP Loans – Managing Reporting
  - Planning for 2021 Conference
  - Other topics brought by participants

**Council Staffed by:**                      Ce Harrison, Chief Financial Officer  
Nick Lozano, Director, Technology  
Andrew Hoffman, Financial Accounting Analyst  
Hunter Wickline, Digital Initiatives Associate

\*Remo link will be given during the Ring Central call