



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, Oswald; Jake Shafer, The Partners Group, and Pete Hendrick, Propel Insurance, CFO Working Group Chair & CFO, BXS
- 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
 - 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