



CFO
Working Group

November 13, 2019 • 1:00 – 4:00 p.m. EDT • Conference Call

Call in Information

Ring Central Meeting ID: 144 320 1596

Attendee Access Code

Agenda

2:00 pm

Opening Remarks

Ce Harrison, CFO, The Council, Jake Shafer, CFO, The Partners Group,

Legislative Update

Joel Kopperud, Government Affairs Team, The Council

Council Academy Programming Update

Maureen Lilenthal, The Council Academy

Investment Markets and Economic Update

Shawn Halsey, SVP, Merrill Lynch

2:30 - 3:30 p.m.

Working Group Roundtable

- 2022 Budgeting and Planning – Assumptions CFOs are using to build 2022 plan for growth, personnel, rates, technology, travel, entertainment, other
 - Cost of Living Adjustment planning
 - Labor shortages affecting brokerage revenue & staffing
- Operational Initiatives
- Basecamp and Communications
- Planning for 2022 CFO Conference
- Other topics brought by participants

Council Staffed by:

Ce Harrison, Chief Financial Officer

Katie Lesemann, Director, Meetings

Nick Lozano, Director, Technology

Andrew Hoffman, Assistant Controller

Hunter Wickline, Digital Initiatives Associate