

## 2022 – 2023 VIRTUAL PROFESSIONAL DEVELOPMENT PROGRAM SCHEDULE

DATES, TIMES & PLATFORM	TOPICS & FEATURED SPEAKERS
<b>SEPTEMBER 2022 SESSION</b>	
<p><b>SEPTEMBER 7, 2022</b> Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p><b>Topic:</b> ESG: Evolution &amp; Opportunities</p> <p><b>Speaker:</b> John Friedman   Managing Director, ESG &amp; Sustainability Practice Grant Thornton LLP</p>
<b>OCTOBER 2022 SESSIONS</b>	
<p><b>OCTOBER 12, 2022</b> Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p><b>Topic:</b> Bank Account Integration &amp; Process Automation</p> <p><b>Speakers:</b> Meghann Crowe   Senior Product Manager   BMO Nicole Welch   Senior Treasury Consultant   BMO</p>
<b>NOVEMBER 2022 SESSION</b>	
<p><b>NOVEMBER 9, 2022</b> Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p><b>Topic:</b> Doing the Right Thing in These Challenging Times</p> <p><b>Speaker:</b> Tim Lietz   National Practice Leader – Risk &amp; Compliance Jefferson Wells</p>
<b>JANUARY 2023 SESSIONS</b>	
<p><b>JANUARY 11, 2023</b> Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p><b>Topic:</b> Quick Fixes &amp; Upgrades for your 401(k)/403(b) Retirement Plan</p> <p><b>Speakers:</b> Kevin Skow   Vice President – Retirement Plan Consultant   Francis Investment Counsel Joe Topp   Vice President – Investment Consulting Services   Francis Investment Counsel</p>
<p><b>JANUARY 12, 2023</b> Time: 12:00 PM – 1:00 PM Zoom Virtual Event</p>	<p><b>Topic:</b> Leveraging Data to Inform Insights, Mitigate Risk &amp; Improve the Value &amp; Overall Health of your Associates</p> <p><b>Speakers:</b> Lisa Metcalf   Area Executive Vice President   Gallagher Insurance Josh Bergman   Area Vice President   Gallagher Benefit Services</p>

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<b>FEBRUARY 2023 SESSION</b>	
<b>FEBRUARY 8, 2023</b> Time: 12:00 PM – 1:00 PM Zoom Virtual Event	<b>Topic:</b> Intellectual Property: The Unprotected Corporate Asset  <b>Speaker:</b> Aon
<b>MARCH 2023 SESSION</b>	
<b>MARCH 8, 2023</b> Time: 12:00 PM – 1:00 PM Zoom Virtual Event	<b>Topic:</b> Supporting Business Owners through their Transition – Planned & Unplanned   Panel Discussion  <b>Panelists:</b> Lisa Horn   Principal   CLA Brian Kleis   Principal   CLA Samantha Metcalf   Managing Principal, Private Industries   CLA
<b>APRIL 2023 SESSION</b>	
<b>APRIL 12, 2023</b> Time: 12:00 PM – 1:00 PM Zoom Virtual Event	<b>Topic:</b> The Top Cybersecurity Weaknesses Most Organizations Face  <b>Speaker:</b> Jeremiah School   MIT District Manager/Partner   Impact Networking