

*laissez les bons temps rouler!*

# all south

CREDIT CONFERENCE 2024

## Wednesday, September 18th

12:00 pm - 3:00 pm	Vieux Carre Ballroom	Exhibitor Set-Up + Attendee Check-In
1:15 pm - 3:15 pm	Fulton Street I	Building Industry Best Practices Discussion
1:15 pm - 3:15 pm	Fulton Street II	Oil & Gas Industry Best Practices Discussion
2:00 pm - 3:15 pm	Fulton Street III	5-7-11 Oh my! Bankruptcy Best Practices
3:30 pm - 4:30 pm	Vieux Carre Ballroom	<b>Leveling Up Your Networking</b> with Diana Crowe, GCA (NACM Southwest)

Everyone agrees that networking is essential to promote yourself, your career, and your future but how do we take those connections to the next level? In this session, we will review networking essentials and how to pair those skills with communication cues that will help us avoid common mismatches with our coworkers (and bosses!) and take our career and relationships (both personal and professional) to the next level. And with the reception scheduled right after her session, the timing couldn't be better to exercise what you learn! *Welcome to NOLA!* Reception 🍷🎵

4:30 pm - 6:30 pm Vieux Carre Ballroom

## Thursday, September 19th

8:00 am - 9:00 am	Vieux Carre Ballroom	Breakfast (Check-in open)
9:00 am - 10:00 am	Vieux Carre Ballroom	<b>Gotcha! Corporate &amp; Banking Fraud</b> with Det. Lt. Michael Shard (Louisiana Fraud & Forgery Association) & Lauren Fitts (Gulf Coast Bank & Trust Company)

The Louisiana Fraud & Forgery Investigator's Association works in collaboration with law enforcement, the banking industry, and the private sector to combat financial crimes. With their background in law enforcement and banking, our presenters will share their experience combating what has become a billion-dollar + industry of fraud. While we are all on alert for known fraud activity, the next scheme is being hatched, the next victim is being played, and the next company is being scammed out of thousands of dollars. This session will raise awareness and knowledge of the trends in financial crimes.

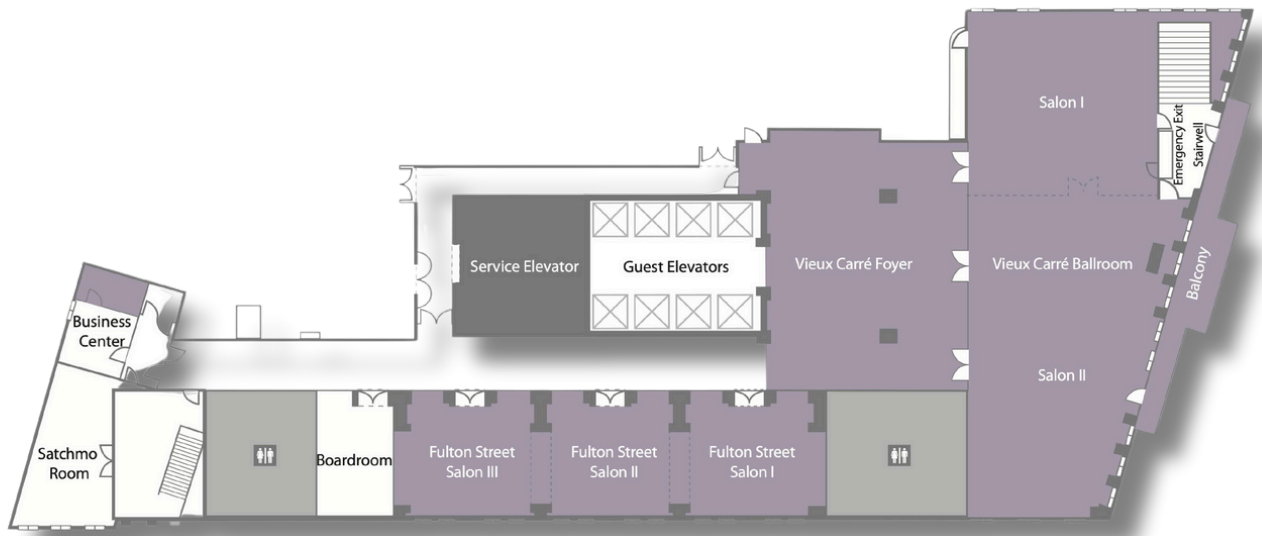
10:00 am - 10:15 am Vieux Carre Foyer Break

*Woohoo!*



## You're *here!*

Welcome to the 2024 All South Credit Conference!  
Scan or click on the QR code to access the digital program, take the feedback survey, join the Facebook discussion, and MORE!



10:15 am - 11:30 am

**Education Circuit I**

Fulton Street I **Construction Law Battlefield** with Randall Lindley, Esq. (Bell Nunnally & Martin LLP)

Join attorney Randall Lindley as he discusses the battlefield strategies he has learned representing creditors in the construction industry for over 35 years. He will discuss which laws to use as a SWORD, including mechanic's and materialmen's lien statutes, prompt pay laws, and construction trust fund statutes. He will also discuss how to SHIELD your business from unfavorable contract provisions including indemnification, change orders, overbroad release language, and pay when paid.

Fulton Street II **Building Best-in-Class Credit Teams** with Joseph Grass, CICP & Chason Dancer, CBA (DXP Enterprises)

Producing high-quality work starts with a good team! When you're assembling your credit department, the questions arise: Where do you begin? What steps do you take? Join Joseph Grass, CICP and Chason Dancer, CBA as they discuss the path they took to build a best-in-class credit team.

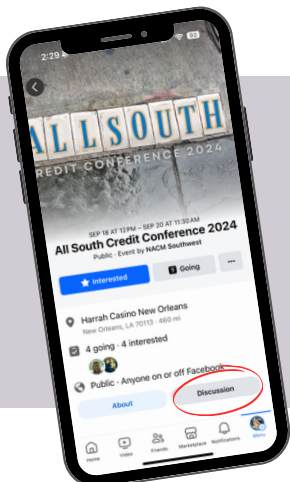
Fulton Street III **Record Keeping Best Practices to Protect Your Receivables** with Ieshia J. Dunmore (Andrews Myers, PC)

Effective and efficient record-keeping is a practice that pays dividends. Expect the best but prepare for the eventuality that an account may end up on your attorney's desk. This session will cover the record-keeping best practices that will increase the likelihood of a favorable outcome.

11:30 am - 12:30 pm

Vieux Carre Ballroom

Lunch & *Name That Exhibitor!* 🍷🍷



**Enter the *chat!***

Share your experience, see what others are saying, and get entered to win prizes by joining the discussion on Facebook!  
**Scan or click on the QR code to get started!**



\*Each time you participate your name will be entered into a drawing to win a \$50 giftcard!

12:45 pm - 2:00 pm

## Education Circuit II

Fulton Street I **Evaluating a Settlement Offer** with Christopher Jameson (Jameson & Dunagan, PC)

Do you ever have to settle with your customers? Whether you are a seasoned veteran or still a rookie, this seminar is for you. Chris Jameson will identify the factors you should consider in any settlement offer. Finally, Chris will provide some tips and tricks for ways you can improve your settlements. This session will help improve and sharpen your skills and impart invaluable information every credit professional should have in their toolkit.

Fulton Street II **Collections & Bankruptcy: Real-World Advice for the Construction Industry** with Winston Grow, Rick Shelby, Marcus Tucker (Phelps Dunbar, LLC)

Contractors, subcontractors, and owners are likely to run into legal issues while managing a construction company's projects and people. These can quickly move beyond simple claims. This session offers guidance on best approaches to navigate construction liens, subcontractor claims, and preservation of collection rights. Our speakers will also provide practical advice for counterparties who find themselves in bankruptcy proceedings involving general contractors, subcontractors or construction project owners.

Fulton Street III **Cannabis Law Update** with Karen Hart, Esq. (Bell Nunnally & Martin LLP)

Join Karen as she covers the history of cannabis, how/where cannabis became legalized, and how/where it remains illegal. She will also dive into the latest federal regulatory and criminal reclassification developments, what may be on the horizon, and the business and liability implications for doing business with the cannabis industry.

2:00 pm - 2:15 pm

Vieux Carre Foyer Break

2:30 pm - 3:45 pm

## Education Circuit III

Fulton Street I **Louisiana Bonds & Liens** with James D. Prescott, III (Prescott Law Office)

Bonds & Liens - the ace up the proverbial sleeve of the material supplier - if you play your cards right! Louisiana law has a brand-new statute regarding 90-day payment requirements when a bond exists. Do you know the details? This session will cover the Louisiana bond and lien process and the details that will protect your rights.

Fulton Street II **Rolling the Dice! Escheatment Case Studies for Credit Professionals** with Troy Wangen (Baker Tilly)

This session presents escheatment examples that mirror real-life scenarios. It will cover how to properly account for write-offs and tracking, discuss terms and conditions and their applicability to escheatment, and, remediation best practices for retaining documentation.

Fulton Street III **Your First Line of Defense: The Credit Application** with Matthew Jameson (Jameson & Dunagan, PC)

The excitement from your sales team to bring on a new customer can invoke some pressure. Of course, the material was needed yesterday and the client is waiting on their order to ship. Sales will be pushing to cut corners or to accept a poorly or partially completed credit application. This contract is your first line of defense! Avoid the pitfalls of a poorly vetted customer and protect the bottom line by doing it right the first time.

3:45 pm - 4:00 pm

Vieux Carre Foyer Break

4:00 pm - 5:00 pm

## Education Circuit IV

- Fulton Street I **NTCR Family Feud** with Ryan Speaks, CGA & Diana Crowe, CGA  
The NTCR and NACM share a common vision: empower credit professionals with information and tools that lead them to success in their credit decisioning and credit management roles. In this session, we will divulge all the tips and tricks to get the most out of your NTCR toolkit. Join us as we discuss how outsourcing your credit reference requests can save valuable time.
- Fulton Street II **Bully-Proof Your Bottom Line: Mastering High-Stakes Credit Negotiations** with Rebecca Hicks (Hicks Law Group)  
Join Rebecca as she tackles the most common challenge in customer relations: dealing with the "bully." In this session, you'll learn how to decode difficult debtors and counter aggressive negotiation tactics employed by challenging clients. Rebecca will cover effective strategies for maintaining cash flow while negotiating favorable terms and delve into the art of balancing credit risk with revenue potential. Gain valuable insights on crafting agreements that protect your company's interests while achieving mutually beneficial outcomes.
- Fulton Street III **Financial Statement Shenanigans** with Toni Drake, CCE (TRM Financial)  
Financial Statement manipulation can range from creative application of GAAP Accounting Rules to complete fraudulent actions. The way in which a company reports its financial statements can affect the quality of earnings and mislead the reader about the financial strength of a company. This session will provide you with some quick and simple steps to help determine the quality of earnings in a financial statement so you can decide if you should ask more questions....or walk away.

5:00 pm - 7:00 pm

Fulton Alley Laissez Les Bons Temps Rouler! 🎵 Dinner, Reception, and Second-Line Parade!

 *laissez les bons temps rouler!*



**Translation? Let the good times roll!** 🎉🍷

Join us for an unforgettable evening with United Tranzactions at Fulton Alley!  
From bowling to NOLA's signature beignets and a second-line parade, you won't want to miss out on the fun!  
Fulton Alley is a short, 5-min walk from Harrah's.

**[CLICK HERE TO GET DIRECTIONS TO FULTON ALLEY!](#)**



## Friday, September 20th

8:00 am - 9:00 am	Vieux Carre Ballroom	Breakfast
9:00 am - 10:00 am	Vieux Carre Ballroom	<b>Harnessing Artificial Intelligence: Creditors' Benefits &amp; Pitfalls</b> with Wanda Borges, Esq. (Borges & Associates, LLC)  Explore the benefits of AI in Credit and Collections! Wanda will touch upon how trade credit executives can adapt and thrive in this rapidly changing landscape and begin to learn what AI-driven solutions are available for enhanced decision-making, risk management, and customer engagement; and harness the power of AI for more informed and efficient risk assessment.
10:00 am - 10:15 am	Vieux Carre Foyer	Break
10:15 am - 11:30 am	Vieux Carre Ballroom	<b>Five Trends Affecting 2024...and into 2025</b> with Chris Kuehl (Armada Corporate Intelligence)  The last few years have been full of the unexpected! While more of the unexpected is expected, there are some trends that can be anticipated. What is the situation with interest rates? What will the labor force look like? What impact will elections have (ours as well as those in Mexico, France, and India)? What happens with China? What does the inflation and recession threat look like? Join us as we gaze into the economic crystal ball with Dr. Kuehl!

**Thank you, Sponsors!** You make it all possible!



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