

October 21, 2009

Summit Executive Centre

Chicago



private company forum

Strategies for
Growth and
Governance

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**8:30 am - 9:30 am**

Registration and Continental Breakfast

9:30 am - 9:40 am

Opening Remarks

9:40 am - 10:55 am**Financing Alternatives and Related Impact In The Current Economic Environment**

This session provides an overview of the current financing environment for privately-held businesses while addressing the different financing alternatives and their feasibility in light of the current market conditions. In addition, participants will walk away with a better understanding of other issues that potentially impact the pursuit of financing such as selected tax and estate-planning related issues.

Stephen McGee, *Executive Director, Corporate Finance*, Grant Thornton LLP

M. Allen Wilson, *Managing Partner, Private Wealth Services*, Grant Thornton LLP

10:55 am - 11:10 am

Networking Break

11:10 am - 12:25 pm**Economic Outlook: Recovery, Opportunity and the Capital Markets**

Recent economic news is mixed. The U.S. Government's efforts to stimulate the economy have been unprecedented in scope, scale, and complexity. Washington Insider, Mel Schwarz, will explore the economic stimulus legislation, its impact, and related business opportunities. In-

vesting opportunities do exist today but significant risks and challenges persist. Beata Kirr will provide an in-depth look at the Capital Markets and discuss how the markets have begun to respond to early signs of economic recovery.

Moderator

Cady North, *Manager, Government Affairs*, Financial Executives International

Panelists

Beata D. Kirr, *Senior Portfolio Manager*, AllianceBernstein

Mel Schwarz, *Partner, National Tax Practice*, Grant Thornton LLP

12:25 pm - 1:10 pm

Networking Luncheon

1:25 pm - 2:40 pm**Behind The Numbers: A Fiscally Fit Health Plan**

Each year, employers across the country are faced with decisions about which health plans to offer employees, which features to include and how much of the expenses they should cover versus passing on to their workers. This session will help you better determine cost-effective strategies that will help you manage your organization's health-care costs. You'll learn which cost drivers will have the greatest impact on growth acceleration; how employers will deal with medical cost projections; how employers will reconcile health plan expense growth with current economic demands.

Nancy Blough, *Executive Vice President*, American Health Data Institute

2:40 pm - 3:55 pm**Strategic Governance: The Common Language, Common Ground, and Common Cause**

The current global economic crisis is a failure of past and present governance systems. Box-checking, legislation and regulations may be necessary, but they are definitely not sufficient. In this session Mark Sickles will explore a new approach to corporate governance through key strategic principles. You'll learn how to self-assess your firm's current strategic governance capability and how to serve as a strategic business partner to your firm.

Mark Sickles, *Fellow*, Governance and Accountability Institute

3:55 pm - 4:10 pm

Networking Break

4:10 pm - 5:25 pm**Focus On The Fundamentals: A Sustainable Approach To Cost Reduction**

The effects of the credit crunch, and stalling revenue growth from the deteriorating market conditions, are increasingly forcing financial executives to reconsider their expense positions. Most executives recognize that there is scope for cost savings within their organizations, it is often harder to visualize how these savings can be realized. In this session Bennett Gross will explore ten fundamentals for a sustainable cost reduction methodology.

Bennett Gross, *President*, Callydus Group, LLC

5:30 pm

Program Adjourns

CPE Credits



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Cancellation Policy

You may transfer your registration to another person at any time. If you must cancel for any reason, notify Financial Executives International in writing by September 20, 2009 to receive a refund, less a \$50 processing fee. Cancellations received between September 21-27, 2009 will be issued a credit to a future FEI conference good for one year, less a \$50 processing fee. No credits or refunds for no shows or cancellations received after September 27, 2009. Contact us by email at conf@financialexecutives.org, by phone 973.765.1029, by fax 973.765.1031 or by mailing to: Financial Executives International 200 Campus Drive, Suite 200, Florham Park NJ 07932.

Summit Executive Centre

205 N. Michigan Avenue | Chicago, IL 60601

FEI is not offering a hotel room block for this program.

Nearby hotels are as follows in order of proximity to the Summit Executive Centre:

The Fairmont Chicago - 866.840.8402

200 N. Columbus Dr. | Chicago, Illinois 60601

Hyatt Regency Chicago - 312.565.1234

151 E. Wacker Dr. | Chicago, Illinois, 60601

Swissotel Chicago - 312.565.0565

323 E. Wacker Dr. | Chicago, Illinois 60601

 LAST NAME

 FIRST NAME

 TITLE

 NAME FOR BADGE

 COMPANY

 BUSINESS PHONE

 BUSINESS FAX

 E-MAIL (REQUIRED)

 BUSINESS ADDRESS (REQUIRED)

 ADMIN NAME

 ADMIN PHONE

 ADMIN EMAIL (REQUIRED)

PAYMENT INFORMATION

MEMBER: \$395.00 (Rate after 9/20/09: \$495.00) **NON-MEMBER: \$495.00** (Rate after 9/20/09 \$595.00)

PAYMENT TYPE

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Featured Speakers Include



*Nancy Blough
Executive Vice President,
American Health
Data Institute*



*Bennett Gross
President,
Callydus Group, LLC*



*Stephen McGee
Executive Director,
Corporate Finance,
Grant Thornton LLP*



*Mark Sickles
Fellow, Governance
and Accountability
Institute*



*M. Allen Wilson
Managing Partner
Private Wealth Services,
Grant Thornton LLP*

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