

BMSA CFO Roundtable

Fall 2017 Roundtable /Training Conference

September 25-27, 2017

All participants will speak on issues that they have addressed in their organizations and provide solutions that have succeeded and those “solutions” that were less than successful. There will be discussion sessions on best profit improvement ideas, year to date financial information, discussion of ESOPs conversions and cyber security. There will be a tour of a LBM location where best practices for Inventory Management and point of sale system will be the focus. Additionally there will be a presentation on “Using Analytics to Improve Profit”, 401K and other Deferred Comp plans and tips and tricks using Excel and Pivot tables.

Learning Objectives:

- Understand the year to date financial data of the Roundtable participants.
- Develop suggested improvements to hosting facility.
- Become knowledgeable in other uses of Excel and Pivot tables
- Understanding of Best Practices in Inventory Management
- Reasons to convert to ESOP’s
- Get a better grasp on Deferred Compensations plans employed by participants

Location

Albany Marriott
Albany, NY

Registration information

To register please e-mail
Lynn Schwarz - lynns@mybmsa.org or
Susie VanLandingham susiev@mybmsa.org

Additional Information:

Prerequisites: Involvement in financial operations of a Building Material Merchant

Contact Information

For more information regarding the program, membership in the CFO Roundtable, fees, refund of fees, concerns, program cancellation and program policies please call Susie VanLandingham at 800-849-1503

Advanced Preparation:

Participants should have access to a lap top computer during the training sessions.
Participants need to complete the financial data sheet by September 10, 2017.

Who Should attend

Members of BMSA, CFO’s, Controllers, Accounting Managers, Internal Auditors and Finance Managers

Earn Up to 12 CPE Credits

Program level: Intermediate
Delivery Method: Group-live

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