



2023 – 2024 PROGRAM SCHEDULE

DATES, TIMES & LOCATIONS	PROFESSIONAL DEVELOPMENT SESSIONS	KEYNOTE SPEAKER(S)
<p>THURSDAY SEPTEMBER 14, 2023</p> <p>In-person Meeting: Bridgewood Conference Center Neenah</p> <p>In-person Time: 2:00 – 6:30 PM Livestream Time: 3:15 – 5:00 PM</p>	<p>Strategic Partner Company Grant Thornton LLP</p> <p>Presenter Joe Ranzau Managing Director</p> <p>Topic AI Emergence in Human Resources & Payroll</p>	<p>Kelly Richmond Pope, PhD, CPA Author, Education Innovator, & Forensic Accounting Expert</p> <p>Topic The Many Faces of Ethics & Fraud In Today's Business Environment</p>
<p>THURSDAY OCTOBER 19, 2023</p> <p>In-person Meeting: Fox Cities Stadium Appleton</p> <p>In-person Time: 2:00 – 6:00 PM Livestream Time: 3:15 – 4:30 PM</p>	<p>Strategic Partner Company CIBC</p> <p>Presenter Jeff Ropiequet Executive Director</p> <p>Topic Hedging Best Practices - Interest Rates, Foreign Exchange & Commodities</p>	<p>Panelists Dr. Frank Braun Dean, College of Business UW - Oshkosh Dr. Kevin Quinn Dean, College of Business St. Norbert College</p> <p>Moderator: Bob Faulds Practice Leader & Partner Truity Partners</p> <p>Topic Higher Education College of Business Panel Discussion</p>
<p>TUESDAY NOVEMBER 14, 2023</p> <p>In-Person Meeting: Rockwood Terrace Green Bay</p> <p>In-person Time: 2:00 – 6:00 PM Livestream Time: 3:15 – 4:30 PM</p>	<p>Strategic Partner Company Brown & Brown</p> <p>Presenters Phillip Bronsteatter Managing Director Pflingsten Partners Kristine Olson Senior Vice President, Brown & Brown Transaction Team Becky Dreier Vice President, Brown & Brown Transaction Team</p> <p>Topic What to Worry About When De-Risking Your Next Acquisition</p>	<p>Kelly Fisher Practice Partner Wipfli LLP</p> <p>Topic Pragmatic AI – Bridging Theory & Practice</p>



2023 – 2024 PROGRAM SCHEDULE

DATES, TIMES & LOCATIONS	PROFESSIONAL DEVELOPMENT SESSIONS	KEYNOTE SPEAKER(S)
<p>THURSDAY January 18, 2024</p> <p>In-person Meeting: Oneida Hotel Conference Center Green Bay</p> <p>In-person Time: 2:00 – 6:00 PM Livestream Time: 3:15 – 4:30 PM</p>	<p>Strategic Partner Company ADP</p> <p>Presenter Rachele Collins, PhD Client Experience Director, Strategic Advisory Services and Business Transformation Practice</p> <p>Topic Turn Your People Data Into Actionable Insights</p>	<p>David Jackson Director of Marketing & Advertising Kwik Trip</p> <p>Topic Inside Kwik Trip’s Customer Loyalty Program</p>
<p>THURSDAY FEBRUARY 15, 2024</p> <p>In-person Meeting: Oneida Hotel Conference Center Green Bay</p> <p>In-person Time: 2:00 – 6:30 PM Livestream Time: 3:15 – 5:00 PM</p>	<p>Strategic Partner Company Weidert Group Inc.</p> <p>Presenter Greg Linnemanstons President</p> <p>Topic Artificial Intelligence: How Sales & Marketing Teams Can Leverage its Power</p>	<p>Kathleen Edelman Author, Speaker & Temperament Expert</p> <p>Topic I Said This You Heard That Temperaments Workshop</p>
<p>TUESDAY MARCH 12, 2024</p> <p>In-person Meeting: Bridgewood Conference Center Neenah</p> <p>In-person Time: 2:00 – 6:00 PM Livestream Time: 3:15 – 4:30 PM</p>	<p>Strategic Partner Company Wipfli LLP</p> <p>Presenters Mo Abuali Director – Digital Strategy, MRD Chris Volz Partner – Valuation, Litigation & Transaction Advisory Services</p> <p>Topic Artificial Intelligence Amplified: Unleashing Hidden Value for Privately Held Companies</p>	<p>Michael Gregory Deputy Chief Economist & Managing Director BMO Capital Markets</p> <p>Topic Economic Outlook: Light at the End of the Tunnel</p>



2023 – 2024 PROGRAM SCHEDULE

DATES, TIMES & LOCATIONS	PROFESSIONAL DEVELOPMENT SESSIONS	KEYNOTE SPEAKER(S)
<p>THURSDAY APRIL 18, 2024</p> <p>In-person Meeting & Academic Achievement Awards: Bridgewood Conference Center Neenah</p> <p>In-person Time: 2:00 – 6:30 PM Livestream Time: 3:15 – 5:00 PM</p>	<p>Strategic Partner Company Truity Partners</p> <p>Presenters Bob Faulds Practice Leader & Partner & Diane Roundy Director, Executive Search</p> <p>Topic A Talent Hungry World; What Got You Here Won't Get You There</p>	<p>Allison Massari Motivational Speaker, Executive Coach, & Award-Winning Visual Artist</p> <p>Topic The Mindset for Success – Activating True Resilience</p>

OTHER CHAPTER EVENTS

<p style="text-align: center;">PEER GROUP MEETINGS</p> <p style="text-align: center;">Thursday, August 24, 2023 Time: 2:00 – 4:30 PM Location: Keller Kaukauna</p> <p style="text-align: center;">Wednesday, December 13, 2023 Time: 2:00 – 4:30 PM Location: Virtual Zoom</p> <p style="text-align: center;">Thursday, February 22, 2024 Time: 2:00 – 4:30 PM Location: Virtual Zoom</p> <p style="text-align: center;">Thursday, May 23, 2024 Time: 2:00 – 4:30 PM Location: Keller Kaukauna</p>	<p style="text-align: center;">2024 FINANCIAL LEADERSHIP SUMMIT</p> <p style="text-align: center;">Dates: May 19-21, 2024 Location: Disney's Contemporary Resort 3600 North World Drive Lake Buena Vista, FL 32830</p>
---	---



2023 – 2024 PROGRAM SCHEDULE

DIVERSITY & INCLUSION GROUP (DIG) EVENTS

2023 LEADERSHIP

LUNCH SERIES

Date: Thursday, August 24, 2023

Time: 11:00 AM – 12:30 PM

Location: Truity Partners Office | Appleton

2023 FUSION EVENT

Date: Tuesday, September 19, 2023

Speaker: [Judi Holler](#)

Location: Fox Cities Performing Arts Center | Appleton

Time: 2:00 – 4:30 PM (Registration begins at 1:00 PM)

2024 SPRING EVENT

Date: May 14, 2024

Time: 8:00 – 11:00 AM

Speaker: Karen Lemke | Lemke Leadership

Topic: It's Your Time to SHINE Leadership Workshop

Location: Foth | DePere