

August 16th & 17th ❖ San Francisco, CA
The Westin Market Street

Financial Intelligence Forum

FP & A 2010



Budgeting & Forecasting
Continuous Scenario Planning
Performance Analysis
FP&A Communication & Integration
Price & Margin Analysis
Rolling Forecasts
Developing a Centralized FP&A Unit

 Gateway Management, Inc.

510-984-3620

www.gmi-solutions.com



Earn 12 CPE Credits



Program Agenda

Monday, August 16th; Day One

8:00 am	Registration, orientation and opening remarks
8:30 am	Keynote: Competitive Advantage through FP&A Drive optimal decision making through extensive qualitative and quantitative analysis
9:45 am	Keynote: Budgeting and Forecasting Case study of FP&A innovation
11:00 am	Link Financial Planning to Strategic Planning: Align budgets with strategies to effectively allocate resources
Noon	Networking break, lunch and open gallery
1:00 pm	Mastering Pricing and Margin Analysis: Support managerial pricing decisions with better operational analysis
2:15 pm	Performance Analysis: Utilize KPIs and performance drivers to improve financial and operational results
3:30 pm	Financial Intelligence Forum Panel: In-depth discussion around the current and future state of FP&A
4:30 pm	Adjourn

Tuesday, August 17th; Day Two - Workshops

8:00 am	Registration, orientation and opening remarks
8:30 am	Keynote: Standardized FP&A Processes Develop consistent forecasting, budgeting, reporting & analysis
9:45 am	Data Consolidation and Aggregation: Reduce time and improve accuracy of data collection
11:00 am	Forecasting For Black Swans: FP&A's role in preparing for high impact improbable events
12:15 pm	Networking break, lunch and open gallery
1:15 pm	Communication and Integration: Achieve and monitor performance by promoting Financial awareness
2:15 pm	Project Management Excellence: Project management essentials for financial analysts
3:30 pm	Financial Intelligence Forum Panel: Discuss benefits and strategies for more centralized, streamlined and efficient FP&A
4:30 pm	Adjourn

Financial Planning & Analysis 2010

Financial Planning & Analysis 2010 is a comprehensive training opportunity that provides best practice case studies, applications sessions, trainer consultation, interactive panel dialogues and peer to peer networking. This format allows attendees to assess best practices from leading organizations, then learn to apply the challenging approaches through hands on learning and lastly, provide group trainer consultation to address specific needs.

The 2010 FP&A Summit Snapshot

- 2 days of advanced Financial Planning & Analysis strategies
- 12 presentations on innovative topics
- Best practice case studies from industry leading practitioners and methodologists
- Take home presentations
- Networking reception at one of the nation's top art galleries
- Small group software demonstration opportunities

Event Sponsor



Continuous Planning & Scenario Analysis



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FP&A 2010

Attendees will instantly realize the difference between this forum and a traditional conference. Our networking reception is hosted in the unique setting of a San Francisco art gallery. Presentations will be conducted by the most talented experts both regionally and nationally. FP&A 2010 is designed to maximize the learning and networking experience for corporate financial professionals.

*Expert practitioners and methodologists
across industry sectors*

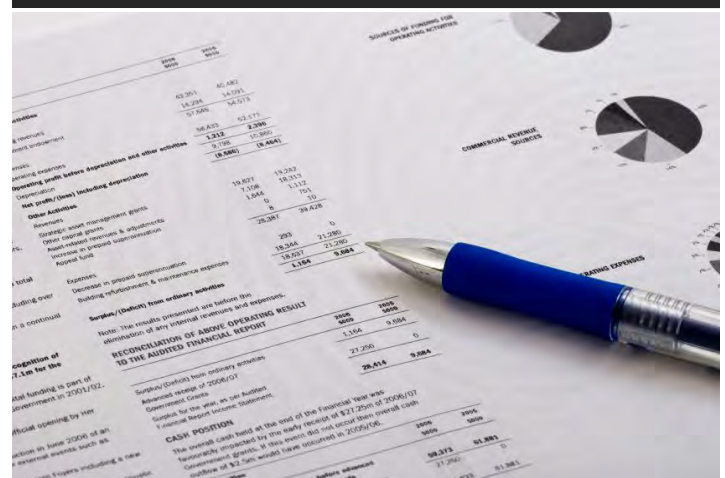
*Networking opportunity to meet with colleagues
and industry experts*

*Unique downtown San Francisco experience in
one of the nation's top art galleries*

FP&A

4 Attendee Team Rate

\$ 4,995



Day One:

Keynote Case Studies & Best Practices



8:30 am

Keynote: Competitive Advantage through FP&A

Drive optimal decision making through extensive financial and quantitative analysis

- Effective analysis that allows senior management to make more informed decisions
- Decision support aligned to business needs and objectives
- Leverage knowledge of key financial measures to optimize performance
- Evaluate contribution margins, operating margins and cash flows for improved ROI
- Apply environmental analysis to uncover future opportunities and risks

9:45 am

Keynote: Budgeting & Forecasting

Optimize financial and operational forecasting for effective budgeting

- Improved and standardized data collection techniques
- Align budgeting to strategies and effectively allocate resources
- Achieve organizational buy-in to budget based decision making
- Develop a methodological approach to budgeting and forecasting
- Implement tools for improved predictability

11:00 am

Link Financial Planning to Strategic Planning

Align budgets with strategies to effectively allocate resources

- Link corporate strategic planning to financial strategic plans and to the annual budget
- Utilize key drivers to establish realistic plan targets for budget owners
- Manage adjustments, coordinate plans and execute more efficiently
- Balance tops-down and bottoms-up planning to ensure the process adds value for all participants
- Capitalize on analytics to improve forecasting and planning

For detailed speaker information, please
contact:

Josh Powell

jpowell@gmi-solutions.com



Day One:

Best Practices & Strategy Sessions

1:00 pm

Mastering Price & Margin Analysis

Support managerial pricing decisions with better operational analysis

- Total product cost and budget forecasting
- Methods for continuous forecasting though fluctuating revenue growth
- Improve gross margins through effective pricing strategies
- Benchmark performance against competition
- Translate data cross-functionally between product, marketing and finance

2:15 pm

Performance Analysis

Utilize KPIs and performance drivers to impact financial and operational results

- Utilize measures that drive accountability and performance
- Determine what KPIs are essential to meet strategic objectives
- Assess the input and performance metrics utilized in the forecasting process
- Utilize a manage system to monitor and drive performance
- Develop timely, engaging reports with thorough analysis of results

3:30 pm

Financial Intelligence Forum Panel

In-depth discussion around the current and future state of FP&A

- Uncover best practices in FP&A from leading organizations
- Analyze ROI, functional performance and aspects of added value to your organization
- Challenge current concepts and strategies through interactive dialogue with contemporaries
- Share stories from the field, scenarios and outcomes for future planning
- Discuss the future of FP&A and the "fast track" to success

For detailed speaker information, please contact:

Josh Powell

jpowell@gmi-solutions.com

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Day Two:

Keynote Case Studies & Best Practices



8:30 am

Keynote: Standardized FP&A Processes

Develop consistent forecasting, budgeting, reporting and analysis

- Framework for incorporating industry standards and best practices
- Ensure accurate information and reliable analysis
- Develop methodological approaches to managing FP&A activities
- Emphasize repeatable processes for forecasting, budgeting and reporting
- Reduce waste, cut costs and eliminate opportunities for errors

9:45 am

Data Consolidation & Aggregation

Reduce time and improve accuracy of data collection

- Develop time efficient and cost effective data gathering strategies
- Consistently extract, analyze and collate data from a variety of sources
- Identify and evaluate process improvement methodologies for data collection
- Implement controls to ensure data flow and integrity
- Cascade strategies across functions and departments to ensure successful execution

11:00 am

Forecasting For Black Swans

FP&A's Role in Preparing for High Impact Improbable Events

- What are Black Swans?
- The **risks and opportunities of "scale" in your business**
- Strategies for preparing for high impact events
- Using scenario analysis to get a handle on exposures
- The Black Swan financial modeling checklist

For detailed speaker information, please
contact:

Josh Powell

jpowell@gmi-solutions.com



Day Two:

Best Practices & Strategy Sessions

1:15 pm

Communication and Integration

Achieve and monitor performance by promoting financial awareness

- Maximize the liaison role between finance and executive decision makers
- Incorporate financial planning and analysis throughout the organization
- Translate financial data to engage employees and attain improved buy-in
- Provide access to information to promote accountability and transparency
- Assist departments and business units track and achieve their performance

2:15 pm

Project Management Excellence

Project management skill set for financial analysts

- Tools to define, plan and manage projects more effectively
- Strategies for creating a effective roadmap of goals, objectives, targets and KPIs
- Methodological approach to tracking and monitoring project performance
- Communicate outcomes and report project data to key stakeholders
- Drive execution and successfully close projects to exceed expectations

3:30 pm

Financial Intelligence Forum Panel

Discuss benefits and strategies for more centralized, streamlined and efficient FP&A

- The Pros and Cons of Centralizing FP&A
- Uncover synergies to maximize efforts and reduce costs
- Improve forecasting, budgeting and reporting through streamlined processes
- Analyze processes to eliminate redundancies, create efficiencies and benefit from scale
- Develop oversight and accountability across all financial activities

For detailed speaker information, please contact:

Josh Powell

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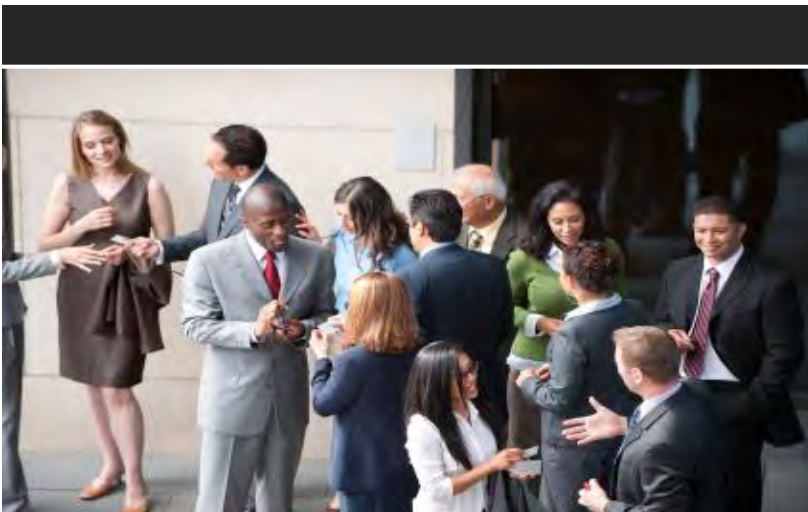
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Networking Opportunities

Not only do attendees come to learn innovative skills and best practices in managerial finance, they also come to meet with peers from different industries across the nation. Keeping this in mind, we have chosen the most unique, tasteful and thought provoking environment available in San Francisco to enhance the experience.

Network with colleagues and industry experts in one of the nation's most esteemed art galleries.

John Pence Gallery is located in the heart of the city, exhibiting classical American realist paintings in this expansive pavilion. During this reception, guests are offered the opportunity to peruse the collection and mingle with colleagues and presenters. A representative will be on hand to answer any questions about the city, the conference or the art.



FP&A 2010

Mastered Program DVD

FP&A 2010 provides a breadth of useful training, case studies and best practices, delivered by industry experts and practitioners. Gateway Management provides access to a mastered program DVD for organizations that want a second chance to view this content or share it among others in their FP&A divisions. This DVD is available for purchase by any attending organization.

Take advantage of pre-conference pricing for the program DVD. Any registered attendee(s) will receive the early purchase rate of:

\$ 799.⁰⁰

For more information on the mastered program DVD, please contact Josh Powell at:

jpowell@gmi-solutions.com



San Francisco

Area, Venue & Travel Information



Earn CPEs

CPE Credits: 12

Gateway Management is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.

Program Level: Basic
Delivery Method: Group-Live
Prerequisites: None
Advanced Preparation: None

To view area map and venue location hold
the CTRL key and:

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FP&A Room Rate

\$ 159.⁰⁰ / night

Online:

<http://www.starwoodmeeting.com/StarGroupsWeb/booking/reservation?id=1006085371&key=DFB30>

Reservations: **1-888-627-8561**

Mention the **Gateway Management Room Block** to the customer service agent to receive this exclusive reduced rate.

Area – San Francisco, Union Square

Located a short two blocks from San Francisco's historic Union Square, our venue is located in the heart of the city's shopping, restaurant, accommodation and entertainment epicenter. Gateway Management has on-the-ground knowledge of the area's best restaurants, hotels and shows to maximize your experience outside the Summit.

Hotel and Accommodation Facilities

Our venue's prime location offers dozens of choices of accommodations from boutique to internationally recognized brands. We have special attendee rates available at The Westin Market Street, San Francisco.

Travel

There are two convenient airports to serve attendees; San Francisco and Oakland International. Both have convenient public transportation by way of BART. Take BART from either airport toward Downtown San Francisco where you will exit at Powell Street Station. Use the accompanying map to walk or cab the 7 blocks to our venue

Conference Venue – The Westin Market St., San Francisco

Venue Address:

The Westin San Francisco

50 Third Street, San Francisco, CA 94103

Reception Venue – John Pence Gallery

John Pence Gallery is nationally and internationally regarded as the premier venue for American classical realism. Surrounded by this collection of contemporary works adds to the uniqueness of the experience for conference attendees.



Registration & Contact Information

Registration Form

Name

Title Organization

Street Address

City/State/Zip

Telephone Fax

Email

Payment Information

Check/Purchase Order Credit Card

Name on Card

Card Number

Expiration Date CV2 (card verification number)

Billing Address

City/State/Zip

Cancellation/Rescheduling Policy

All cancellations that made four weeks or longer from the summit's start date will be provided a full refund or credit toward current or future Gateway Management programs. Any cancellations made within four weeks of the programs start date will be provided with credit toward current or future Gateway Management programs.

Fees ♦ Registration

<input type="checkbox"/>	Early Registration	\$ 1,599.00
<input type="checkbox"/>	Standard Registration	\$ 1,799.00
<input type="checkbox"/>	4 Attendee Group Rate	\$ 4,995.00
<input type="checkbox"/>	Additional Attendee	\$ 1,299.00
<input type="checkbox"/>	Mastered Event DVD	\$ 799.00

For "Early Registration", register by June 18, 2010

Call

510-984-3620

Fax

510-380-7377

Online

www.gmi-solutions.com

For group discounts, packages and local information please email Josh Powell:

jpowell@gmi-solutions.com