*Speaker Proposal Information*

The Education Committee is currently seeking proposals from Speakers and Presentation Teams for education sessions and round tables for TEXPO 2024. Teams should consist of 2-3 members with no more than 1 member representing the session sponsor and remaining members representing clients/practitioners.

Priority consideration will be given to those Teams including client/practitioner co-presenters and proposing fresh, current, hot-topics especially those relating to current legislation and new trends in finance and treasury management.

*Timeline*

November 30, 2023 Proposals due to [jmoriartyiv@outlook.com](mailto:jmoriartyiv@outlook.com)

Nov. 30, 2023 – Jan. 15, 2024 Acceptance Notification

March 31, 2024 Final Presentations due to TEXPO Education Committee and John Moriarty (in PDF

Format) for posting on the website. Send to jmoriartyiv@outlook.com

April 16 – 18, 2024 TEXPO® 2024 Conference

*After February 28, 2024, any changes to Presentations or Presentation Teams will need authorization from the TEXPO® 2024 Education Committee. TEXPO® 2024 reserves the right to replace any session for which there is a change of speaker or presentation.*

*Proposal Guidelines*

Submit proposal summary in a Word document which includes the following information:

**Session Title/Presentation Level** – please specify if the session will be basic, intermediate, advanced, or executive level. Guidelines for these levels are on the following page.

**Topic Description** – Include a brief description (200-250 words) of the topic content including what will be covered, what the attendees will learn and support for the presentation level you are proposing.

**Speaker Information** – for each speaker, include the name, title, company, address, phone, fax, and email address.

If applicable, please include a list of similar education topics you have presented in the past including the organization or conference that sponsored your presentation. Also include biographical information (75–125 words) which includes current responsibilities, career history, education, and professional credentials.

**Audio Visual Equipment Requirement** – Specify equipment needed, if currently known and if not standard. All rooms are equipped with LCD video/computer projection and lavaliere microphones. Speakers should bring presentations on their own laptop computers.

Speaker must agree to provide quality handout material for the session. As a minimum, this should include copies of the slides with room for notes. Additional materials such as examples and glossaries are encouraged. All handouts and slides should be saved in PDF format and will be provided electronically to the attendees.

*Guidelines for Topic Levels*

**Executive (X)**

Sessions in this track are designed for Director – CFO level executives with extensive experience. These sessions may be an executive summary of new developments in an area of corporate financial management, and/or a high-level technical discussion.

The material presented assumes the participants have a high level of experience. This track is designed for the experienced, senior level Treasury professional who wants to delve deeper into higher-level topics.

**Advanced (A)**

Sessions in this track are designed for executives with significant experience in the subject matter, but who are interested in new developments, a higher level of understanding and/or more detail understanding.

These sessions should not include any Basic introductory material.

**Intermediate (I)**

Sessions in this track are designed for general attendance by participants with a wide variety of experience levels. The subject matter should be designed for practical application and should not include more than a minimal amount of Basic material.

The majority of sessions fall into this category.

**Basic (B)**

Sessions in this track are designed for participants with lower experience levels who are seeing a basic understanding of the subject matter. Some participants may have substantial business experience but may not have experience in the session subject matter. Others may attend the session as a refresher. CTP credit hours are not earned in Basic sessions.

Material presented should not go beyond the intermediate level.

Question and Answer Periods are encouraged at all sessions since they address participants’ specific needs and are an excellent learning tool. Speakers may either accept questions during the presentation or wait until the end of the presentation.

**TEXPO® 2024**

**CALL FOR SPEAKERS**

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| **1. pROPOSED TITLE** | | | |
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| **2. SESSION LEVEL** (B – Basic, I – Intermediate, A – Advanced, E – Executive)  Level of experience and knowledge required for attendees of your session. (See guidelines above.) | | | |
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| **3. dESCRIPTION OF SESSION TOPIC AND CONTENT (75 WORDS MAX)** If your proposal is selected, the description in this section will be used for pre-conference publicity and the conference program information. Please be clear and concise with your session description. | | | |
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| **4. SESSION OUTCOMES**  Sessions with two speakers are encouraged (corporate practitioner and vendor). | | | |
| **4. A. LEARNING OBJECTIVE(S)** Describe, in one to three sentences or bullets, what participants will learn in this session. | | | |
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| **4. B. PRIMARY AUDIENCE** Describe the type of audience that would be interested in this presentation. | | | |
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| **5. A. PRESENTER INFORMATION Presenter teams should consist of 2-3 members with no more than 1 member from bank/vendor/supplier and remaining members representing clients/practitioners** | | | |
| **NAME** | **ACCREDIDATIONS (CTP, CPA, etc)** | | |
|  |  | | |
| **TITLE** | **COMPANY NAME** | | |
|  |  | | |
| **ADDRESS** | **CITY, STATE, ZIP** | | |
|  |  | | |
| **PHONE** | **EMAIL ADDRESS** | | |
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| **BIO (500 WORD MAX)** A biography must be submitted for each presenter. If the presentation is selected, the biography submitted will be used in the final program. **Proposals without bios will not be accepted.** | | | |
|  | | | |
| **5. B. CO-PRESENTER INFORMATION Presenter teams should consist of 2-3 members with no more than 1 member from bank/vendor/supplier and remaining members representing clients/practitioners** | | | |
| **NAME** | | **ACCREDIDATIONS (CTP, CPA, etc)** | |
|  | |  | |
| **TITLE** | | **COMPANY NAME** | |
|  | |  | |
| **ADDRESS** | | **CITY, STATE, ZIP** | |
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| **PHONE** | | **EMAIL ADDRESS** | |
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| **BIO (500 WORD MAX)** A biography must be submitted for each presenter. If the presentation is selected, the biography submitted will be used in the final program. **Proposals without bios will not be accepted.** | | | |
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| **5. C. CO-PRESENTER INFORMATION Presenter teams should consist of 2-3 members with no more than 1 member from bank/vendor/supplier and remaining members representing clients/practitioners** | | | |
| **NAME** | | **ACCREDIDATIONS (CTP, CPA, etc)** | |
|  | |  | |
| **TITLE** | | **COMPANY NAME** | |
|  | |  | |
| **ADDRESS** | | **CITY, STATE, ZIP** | |
|  | |  | |
| **PHONE** | | **EMAIL ADDRESS** | |
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| **BIO (500 WORD MAX)** A biography must be submitted for each presenter. If the presentation is selected, the biography submitted will be used in the final program. **Proposals without bios will not be accepted.** | | | |
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| **6. NUMBER OF PRESENTERS** | | |  |
| **7. NOTIFIED CO-PRESENTER (S)** I have notified my co-presenter that I am submitting this proposal. | | | YES / NO |
| **8. PRESENTATION DEADLINES** | | | |
| **PDF Deadline** | | | **March 31, 2024** |
| **Do you agree that PDF can be posted on TEXPO website?** | | | YES / NO |
| **PowerPoint Presentation** | | | **Presenters must bring their own laptops. Presentation File Name (PPT & PDF) should match the name of the Presentation Title.** |
| **9. SUBMITTER DETAILS** | | | |
| **Submitter’s Name** | | | |
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| **Submitter’s Email Address** | | | |
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| **Submitter’s Phone** | | | |
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| **10. PROGRAM CONTACTS (Return form to the below)** | | | |
| John Moriarty | | | TEXPO® 2024 Program Director |
| Email: | | | jmoriartyiv@outlook.com |