



"BREWING UP BUSINESS"

37TH Annual Conference – Milwaukee, Wisconsin

Sunday, May 18, 2014

| Time | Event | Location |
|------------------------|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 4:00 p.m. – 6:00 p.m. | Registration | Lakeshore Ballroom, 1 st Floor |
| 7:00 p.m. – 9:30 p.m. | President's Reception (Business Attire) | Polaris |
| | Sponsor:  |  |
| 9:30 p.m. – 12:00 a.m. | Hospitality Suite | Grand Suite, 17 th Floor Rm. 1711 |
| | Sponsor:  | |

Monday, May 19, 2014

| Time | Event | Location |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| 7:30 a.m. – 4:00 p.m. | Registration | Regency Prefunction |
| 7:30 a.m. – 8:30 a.m. | Breakfast | Regency AB |
| 8:30 a.m. – 8:50 a.m. | Opening Ceremony | Regency CD |
| 8:50 a.m. – 9:00 a.m. | Welcome Address: Rebecca Kleefisch, Wisconsin Lieutenant Governor | Regency CD |
| 9:00 a.m. – 9:15 a.m. | Announcements | Regency CD |
| 9:15 a.m. – 10:15 a.m. | Roll Call of Jurisdictions | Regency CD |
| 10:15 a.m. – 10:30 a.m. | Break | Atrium |
| 10:30 a.m. – 11:30 a.m. | Roll Call of Jurisdictions | Regency CD |
| 11:30 a.m. – 12:00 p.m. | General Session: Global Legal Entity Identifier System: Sherman Boone (U.S. Securities & Exchange Commission) | Regency CD |
| 12:00 p.m. – 1:30 p.m. | Lunch | Regency AB |
| 1:30 p.m. – 2:30 p.m. | General Session: ECRF/CRF/IACA Survey–2014 Report, Definitions Update and What's Next. Annika Bränström (Sweden), Hayley Clarke (Nova Scotia), Monica Grahn (Sweden), Celia Johnston (Germany) | Regency CD |
| 2:30 p.m. – 2:45 p.m. | Break | Atrium |

Monday, May 19, 2014 Cont.

| Time | Event | Location |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| 2:45 p.m. – 3:45 p.m. | Merit Awards Sponsor:  | Regency CD |
| 3:45 p.m. – 4:30 p.m. | Updates from International Associations CACLA - Myron Pawlowsky (Manitoba) ECRF – Annika Bränström (Sweden) CRF – Tim Moss (United Kingdom) NPRRA – Blair Wagner (NPRRA) | Regency CD |
| 5:30 p.m. – 9:30 p.m. | Evening Event: Miller Park (Casual) Sponsor:  | Miller Park  |
| 9:30 p.m. – 12:00 a.m. | Hospitality Suite Sponsor:  | Grand Suite, 17th Floor Rm. 1711 |

Tuesday, May 20, 2014

| Time | Event | Location |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|
| 7:30 a.m. – 4:00 p.m. | Registration | Regency Prefunction |
| 7:30 a.m. – 8:30 a.m. | Breakfast | Regency AB |
| 8:30 a.m. – 10:30 a.m. | Section Meetings BOS/IRS: Best Practices in the Development of a State Business Center: Kathy Sachs (KS); Maureen Ewing (RI); Duncan Friend (KS) STS: Jurisdictional Guidelines for Accepting a UCC Record Presented for Filing: Darrell Pierce (Dykema Gossett PLLC/NPRRA); Robert Lindsey (VA); Randy Moes (TX) | Regency C Regency D |
| | Sponsor:  | |
| | ITS: Improving Constituent Communications: Beth Ann Surber (WV); Patrick Reed (WA) Mobile Applications: David Remson(LA); Jon Evans (Tecuity); Cecil Davis (AR) | Executive Ballroom |
| 10:30 a.m. – 10:45 a.m. | Break | Atrium |


Tuesday, May 20, 2014 Cont.

| Time | Event | Location |
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| 10:45 a.m.– 12:00 p.m. | <p>Section Meetings</p> <p>BOS/IRS: Encouraging Business While Fighting Fraud (Presentation of NASS White Paper by Delaware, Nevada, and Wyoming): Karen Wheeler (WY); Scott Anderson (NV); Rick Geisenberger (DE)</p> <p>STS: The Post-2010 Amendment World and The Customer Perspective: Despina Shields (National Corporate Research, Ltd.); Paul Hodnefield (Corporation Service Company); Wally Boggus (Capitol Services, Inc.); Maureen Ewing (RI)</p> <p>ITS: Coding Challenge: Trevor Timmons (CO); Brian Gryth (CO); Mike Hardin (CO)</p> | <p>Regency C</p> <p>Regency D</p> <p>Executive Ballroom</p> |
| 12:00 p.m. – 1:30 p.m. | Lunch | Regency AB |
| 1:30 p.m. – 2:45 p.m. | <p>Section Meetings</p> <p>BOS/IRS: Best Practices: Expedited Services: Marissa Soto-Ortiz (MA); Julia Dale (MI); Scott Anderson (NV)</p> <p>STS: Legislative Update/Update on Permanent Editorial Board Bogus Filing Workgroup: Paul Hodnefield (Corporation Service Company)</p> <p>ITS: IT Workforce Retention: Jenny Kvistad (University of Wisconsin); John Amundson (WI)</p> | <p>Regency C</p> <p>Regency D</p> <p>Executive Ballroom</p> |
| 2:45 p.m. – 3:00 p.m. | Break | Atrium |
| 3:00 p.m. – 4:30 p.m. | <p>Section Meetings</p> <p>BOS/IRS: BOS/IRS Roundtable:</p> <p>3:00 p.m. - 3:45 p.m. United States Patent Trademark Office Discussion Group, Susan Anthony (USPTO) Reducing Document Rejection Rates, Marissa Soto-Ortiz (MA) Performance Metrics: What do they measure and are they really valuable? Daryl Bassett (AR) Business Process Efficiencies: Is there still room for improvement?, Josef Gasimov (DC)</p> <p>3:45 p.m. – 4:30 p.m. Certifications: What type of certificates does your office issue and what things will it not certify to?, Regina Goff (KS) Data Sharing and Sales: What type of data does your agency sell, under what circumstances and to whom?, Kathy Berg (UT) ECRF/CRF/IACA Survey – How do we make it most useful to you? Your input on questions, topics, themes and suggestions for change. Hayley Clarke (Nova Scotia)</p> <p>STS: Secured Transaction Roundtable: Robert Lindsey (VA); Randy Moes (TX); Sherri DeMarco (MI); Cathy Beaudoin (ME); Tom Wrosch (OR); Lesley Lueckenotte (MO); Paul Hodnefield (Corporation Service Company); Katie Zvolanek (OH)</p> <p>ITS: ITS Roundtable: Cecil Davis (AR)</p> | <p>Regency C</p> <p>Regency D</p> <p>Executive Ballroom</p> |

Tuesday, May 20, 2014 Cont.

| Time | Event | Location |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| 5:30 p.m. – 9:30 p.m. | Evening Event: H-D Museum (Casual) Sponsor:  | Harley-Davidson Museum  |
| 9:30 p.m. – 12:00 a.m. | Hospitality Suite Sponsor:  | Grand Suite, 17th Floor Rm. 1711 |

Wednesday, May 21, 2014

| Time | Event | Location |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| 7:30 a.m. – 3:00 p.m. | Registration | Regency Prefunction |
| 7:30 a.m. – 8:30 a.m. | Breakfast | Regency AB |
| 8:30 a.m. – 10:30 a.m. | Joint Session BOS/ITS/STS/IRS: Evolution of a Business Office: Kim Coppola (ISC); Daryl Bassett (AR); Tom Wrosch (OR); Mike Hardin (CO) | Regency CD |
| 10:30 a.m. – 10:45 a.m. | Break | Atrium |
| 10:45 a.m. – 12:00 p.m. | Section Meetings STS/ITS: Search Logic & Noise Words: How to Proceed when making Changes: Darrell Pierce (Dykema Gossett PLLC/NPRRA); Wally Boggus (Capitol Services, Inc.); Ben Ark (National Corporate Research, Ltd.) BOS/IRS: Protection and Enforcement of Trademarks, in the U.S. and Abroad: Susan Anthony (U.S. Patent and Trademark Office) Utah Trademark Manager Presentation: Kathy Berg (Utah) Sponsor:  | Regency CD Executive Ballroom |
| 12:00 p.m. – 1:00 p.m. | Lunch | Regency AB |
| 1:00 p.m. – 1:45 p.m. | Jurisdictional Presentations Colorado – Service Centre Model: Mike Hardin Vermont – Transition to Paperless: Ali Sarafzade Utah – Business Identity Theft Initiative: Kathy Berg | Regency C Regency D Executive Ballroom |

Wednesday, May 21, 2014 Cont.

| Time | Event | Location |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 2:00 p.m. – 3:00 p.m. | Jurisdictional Presentations Connecticut – Online Business Start Up Tool: Seth Klaskin Indiana – E-Mail Manager Online Application: Rebecca Longfellow Zambia – Companies Law Reforms: Christopher Mapani | Regency C Regency D Executive Ballroom |
| 6:30 p.m. – 10:00 p.m. | Evening Event: Reception and Dinner (Cocktail Business Attire) Sponsor:  | Prefunction & Regency AB  |
| 10:00 p.m. – 12:00 a.m. | Hospitality Suite Sponsor:  | Grand Suite, 17th Floor Rm. 1711 |

Thursday, May 22, 2014

| Time | Event | Location |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
| 7:30 a.m. – 8:30 a.m. | Breakfast | Regency AB |
| 8:00 a.m. – 8:30 a.m. | Member Registration | Regency Prefunction |
| 8:30 a.m. – 9:15 a.m. | General Session: Web Site Update: Nick Dalton (Foster Moore) | Regency CD |
| 9:15 a.m. – 10:15 a.m. | General Session: Court Ordered Removal of Filings: Bert Black (MN); Seth Klaskin (CT); Joe DeFilippis (MT) | Regency CD |
| 10:15 a.m. – 10:30 a.m. | Break | Atrium |
| 10:30 a.m. – 12:00 p.m. | Closing Business Meeting | Regency CD |
| 12:00 p.m. – 1:30 p.m. | Lunch | Regency AB |
| 1:30 p.m. – 3:30 p.m. | General Session: Social Media: Cecil Davis (AR); Beth Ann Surber (WV); Tom Wrosch (OR) | Regency CD |
| 5:30 p.m. – 11:00 p.m. | Closing Evening Event: Reception and Dinner (Casual) | Regency AB |
| 11:00 p.m. – 2:00 a.m. | Hospitality Suite Sponsor:  | Grand Suite, 17th Floor Rm. 1711 |