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Hampton Roads Association for Financial Professionals
Breakfast Meeting - Tuesday June 16, 2009
www.hrafp.org

HRAFP now features online, electronic registration for all events. Please use this link to RSVP:
<http://hamptonroadsafp.eventbrite.com>

- 8:00 - 8:30 a.m. Registration & Networking Time
Fee – No charge for HRAFP Members
\$25 for Non-Members/Guests
- 8:30 a.m. Breakfast Served - Welcome - Debra Ciampoli, Past President
- 9:00 a.m. Speaker Introduction – Stephanie Foster
Topic: “The What, When, and How of RFP’s”
Speaker: Mr. Nelson Bush, Sr. Managing Partner, PFM
- 9:50 a.m. Announcements – Debra Ciampoli, Past President
- Officers/Board of Directors for coming year
 - Renewal Notices
 - Surveys
 - CTP and CPE Credits
- 10:15 a.m. Adjournment

All members and guests should respond no later than June 10th using this new link. If you have questions regarding the registration process, please contact Terry Perkins tperkins836@verizon.net .

REMINDER: This meeting qualifies for one CTP or CPE credit – please sign up at the registration table to receive your electronic certificate.

Don't forget to complete your survey – we are interested in your suggestions and comments!

REMINDER: UPCOMING MEETING DATES:

August 18 – Breakfast Meeting
October 20 – Breakfast Meeting
December 15 – Breakfast Meeting



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HRAFP Breakfast Meeting June 16, 2009, 8:30 a.m.

Program Description

“The What, When, and How of RFP’s”

Speaker – Mr. Nelson Bush, Sr. Managing Consultant, PFM

HRAFP is very proud to have Nelson Bush with us today. Mr. Bush has quite an extensive history in the field of Request for Proposals (RFP’s) and brings to HRAFP a taste of how these documents can affect those of us in the Treasury Field. He’ll speak as a user of banking services and as a consultant that helps issue RFP’s. He’ll focus on 3 areas:

1. (As a user of treasury services...) When is it time to issue an RFP?
2. (When you issue an RFP...) What key questions should you ask?
3. (When responding to an RFP...) How can you differentiate your services?

Mr. Bush’s presentation is very popular, and one that will leave attendees with a multitude of ideas.



Speaker Biographical Information

Nelson L. Bush
Senior Managing Consultant, PFM

Nelson L. Bush, a Senior Managing Consultant, joined PFM in 1993. Mr. Bush assists Virginia municipal governments, operating authorities, the Commonwealth of Virginia, the Commonwealth's agencies, and institutions of higher education with the investment of bond proceeds, operating funds, reserve funds, and monies set aside to fund OPEB liabilities. Mr. Bush is also the Program Administrator for the Virginia State Non-Arbitrage Program (VA SNAP). In this role Mr. Bush helps VA SNAP participants with the investment and tracking of bond proceeds in compliance with the IRS arbitrage rebate regulations.

Mr. Bush is a frequent instructor for the Virginia Government Finance Officers Association and Treasurers' Association of Virginia and regularly teaches class on cash management, investment management, and debt management.

Mr. Bush serves as Treasurer of the Arlington County Chapter of the American Red Cross. Mr. Bush is a graduate of York College of Pennsylvania with a Bachelor of Science in accounting and a focus in religious philosophy.

NASD Exams: Series 6, 52, and 63



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Directions to the Holiday Inn Select Norfolk Airport (1570 N. Military Highway, Norfolk VA):

From Richmond and Points West:

Take I-64 East.
Take Exit #281 (South Military Highway).
Immediately get in left lane.
Turn Left at first traffic light (Elizabeth Drive) and enter the hotel parking lot.

From the Carolinas and Points South:

Take I-95 North to I-295 North (beltway around Richmond) to I-64 East.
Take Exit #281 (South Military Highway). Immediately get in left lane.
Turn left at first traffic light (Elizabeth Drive).

If coming from Eastern North Carolina, pick up I-64 in Chesapeake, Virginia:

Take exit #282 (Northampton Blvd)
Get in Left Exit Lane and go left at traffic light at the end of the ramp
(you will pass under I-64).
Turn Right onto Military Hwy and enter the hotel parking lot

From Norfolk International Airport:

Follow airport access road to Main Exit.
Take a Left at first traffic light onto Azalea Garden Road.
Then turn left at first traffic light onto Military Highway.
Go under I-64 and turn left at first traffic light (Elizabeth Drive) into hotel.