



**NORTHEAST ACQUIRERS**  
A.S.S.O.C.I.A.T.I.O.N  
CELEBRATING 35 YEARS

## **Session Descriptions**

### **Surcharging and Cash Discounting....Separating Fact from Fiction:**

This panel session will cover all of the rules and regulations from the card schemes as well as states rules. In addition, panelists will cover what it takes to implement a program and what must be covered in the operational process.

Moderator:

- Holli Targan - Jaffe Raitt, Heuer & Weiss

Panelists:

- Jonathan Razi – CardX
- John Barrett – NXGEN
- Robert Heinrich – SimPay.

### **Navigating Through Complex Payment Models:**

This Town Hall session covers multiple payment models including PayFac, ISV, MSP's, ISO's, etc. It will cover the pros and cons of each, the rules of engagement, partners and technology.

Moderator:

- Bruce Shirey – Amaryllis

Participants:

- Doug Elkins - Woodmoor Advisors
- Caroline Hometh - RPY Innovations
- Denis Robert - Payfacto
- Deana Rich - Infiniccept
- Todd Stone - FIS/WorldPay

**View from the Hill and State Legislation Issues:**

This Session will feature Scott Talbott from ETA in his annual review of legislative issues. Of particular interest this year are state's initiatives on real time sales tax and the impact on the industry.

**Value Add Spotlight:**

This session will become a regular feature each year spotlighting a value-add service that could increase sales. It will be in the form of a fireside chat. This first one will focus on selling card issuing products to merchants: pros, cons and benefits.

Discussion Leader:

- Amy Zirkle - ETA

Participant:

- Scott Goldwaithe - Aliaswire.

**M&A: Investment and Growth opportunities in the Aftermath of the Mega Mergers:**

This session has Greg Cohen from Lovell Minnick Partners talking with panelists about how the mega mergers have affected the payments industry and what the future holds for ISOs.

Moderator:

- Greg Cohen – Lovell Minnick Partners

Panelists:

- Tim Willi – Wells Fargo Equities & Securities
- Lane Gordon – Preston Todd Advisors
- Erik Scott – Pareto Capital Partners

### **Cannabis and CBD:**

Hottest topic in the industry. Concluding the 2020 NEAA with a panel on covering the rules, the legislation and some ways to make growing vertical work.

Moderator:

- Donna Embry – NEAA Board Member

Panelists:

- Niamh Lewis - Versk Financial
- Gerard Olson - LegitScript
- Courtney Forques – Portal42
- Fadi Cheikha - US Alliance group
- Bill Baustien - Pueblo Bank and Trust