



# 21st ANNUAL NORTHEAST REGIONAL CONFERENCE

**August 19 - 20, 2026**

Saratoga Casino Hotel  
Saratoga Springs, New York



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# Keynote Speaker Afshin Molavi

**Geopolitics and Global Economics Expert; Senior Fellow, Foreign Policy Institute at Johns Hopkins University SAIS**



Afshin Molavi helps audiences navigate a rapidly shifting global landscape—translating economic, geopolitical, and social changes into insights that matter for their businesses, industries, and communities.

A leading authority on global trends, Afshin Molavi blends rigorous analysis with engaging storytelling to make sense of complexity, find the unexpected patterns, and uncover opportunity. With decades of reporting and research across Asia, Africa, Europe, and the Americas, Molavi connects the dots between geopolitics, supply chains, demographics, technology, energy, and finance. He shows how the forces reshaping boardrooms in London, Shanghai or Dubai also reverberate in Chicago, Dallas, and Detroit. Always forward-looking, he challenges audiences not just to weather today's turbulence but to position themselves for tomorrow's opportunities.

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**Keynote Speaker**

# Afshin Molavi

**...continued**



A Senior Fellow at the Foreign Policy Institute of Johns Hopkins SAIS, Molavi is the founder of the Emerging World newsletter and co-founder of the emerge85 Lab. His writing has appeared in The New York Times, The Economist, Businessweek, and Institutional Investor, and he has held reporting roles with Reuters, The Washington Post, and the Financial Times.

He has also served as a senior global advisor at Oxford Analytica and was named a Young Global Leader by the World Economic Forum in Davos. Molavi views globalization not as a relic of the past but as an evolving force that shapes our daily lives. As he often puts it, “Globalization is not somewhere distant—it’s in your cup, your car, your culture.” From your morning coffee to the technology in your pocket, he reveals how global connections create both challenges and opportunities for American companies and workers.

Known for his approachable style, wit, and sharp insight, Molavi often draws on history, literature, film - and even pop culture and sports to make global issues vivid and accessible. From Wall Street to Main Street, from the boardrooms of Europe to the stadiums and cities of Asia and the Middle East, he has delivered impactful keynotes for corporations, associations, and investors worldwide, leaving audiences with a clearer view of where the world is headed and how to prepare for what’s next.

**Keynote  
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# Wednesday, August 19th

## Optional Activities for Attendees

Start your conference off with either of these optional events on Wednesday during the day before our cocktail reception!

Lunch, sponsored by Second Wind Consultants, is provided for these events!



### **F. Matthew Jackson Memorial Golf Tournament**

Saratoga Spa Golf Course

12:30 p.m. - 5:30 p.m.

\$200 per person



### **Tennis Tournament**

Saratoga Golf & Polo Club

1:00 p.m. - 4:00 p.m.

\$150 per person

# 21st Annual TMA Northeast Regional Conference

Optional Activities for Attendees

## Siege of Saratoga Historical Tour

**Wednesday, August 19th**

**Experience the dramatic 1777 siege that changed the course of the American Revolution. This guided tour explores the landscape around Schuylerville and Saratoga where British forces were surrounded and ultimately forced to surrender—a turning point that shifted momentum to the American cause.**

**Walk the ground where history unfolded through the eyes of those who lived it. Visit entrenchments, fortifications, and battle sites while hearing the stories of remarkable individuals—from Philip Schuyler to Baroness Riedesel, history's first female war correspondent.**

**Discover more than military strategy: the human stories of camp followers, loyalist families torn apart, soldiers fighting against their own countrymen, and how one siege transformed the Revolution and secured French alliance.**



A guided tour of the Saratoga siege landscape, sponsored by BHC Capital Partners! If you will not be participating in the Golf or Tennis tournament, this tour is a great alternative to connect with other attendees!

The tour will depart from the hotel at 11:30 am by bus. There will be a quick lunch of burgers and hot dogs during the tour. We will visit multiple historic sites around Schuylerville and Saratoga, including the Schuyler House, entrenchments, and the Saratoga Battle Monument. Licensed tour guide Patrick Niles will lead us through the landscape where the 1777 siege unfolded, sharing stories of the people and events that shaped this pivotal moment in the American Revolution. We will return to the hotel around 4:00 pm.

### **Saratoga Battlefield Historical Tour**

**Saratoga National Historical Park**

**11 am- 4 pm**

**\$50 per person**

NEW FOR 2026!

# 21st Annual TMA Northeast Regional Conference

Optional Activities for Attendees

Wednesday, August 19th - 8 pm

## DINE AROUND *Saratoga*



Looking for a unique networking opportunity? Join fellow conference attendees for our inaugural **Dine Around Saratoga** experience on Wednesday evening following the Opening Reception.

Designed to help attendees **connect** in a more relaxed, small-group setting, this is a great option for first-time attendees, those looking to meet new people, or anyone who doesn't already have dinner plans for the evening.

### HOW IT WORKS



No additional cost to participate!



During conference registration, select the Dine Around option.



You'll receive a link to reserve your seat at one of our participating restaurants.



Each restaurant reservation begins at **8:00 PM**.



Attendees are responsible for paying for their own meal (individual checks or splitting the tab).

### CHOOSE FROM ONE OF THREE DOWNTOWN SARATOGA RESTAURANTS



#### WHEATFIELDS

ITALIAN & SCRATCH KITCHEN  
\$\$-\$\$\$



Fresh pasta, seafood, steaks, and classic Italian favorites. A comfortable setting with something for everyone!



#### THE COAT ROOM

SPEAKEASY & ELEVATED DINING  
\$\$\$-\$\$\$\$



An intimate atmosphere featuring craft cocktails and upscale cuisine. Perfect for meaningful conversations in a refined setting.



#### WASABI

JAPANESE, SUSHI & ASIAN FUSION  
\$\$-\$\$\$



Sushi, hibachi favorites, and a variety of Asian inspired dishes in a lively and welcoming atmosphere



ONLY **8** SEATS HAVE BEEN RESERVED AT EACH RESTAURANT TO CREATE A MORE INTIMATE NETWORKING EXPERIENCE.



ADDITIONAL SEATS MAY BE ADDED BASED ON DEMAND.



ALL PARTICIPATING RESTAURANTS ARE CONVENIENTLY LOCATED DOWNTOWN AND ACCESSIBLE VIA THE **HOTEL SHUTTLE**.

# 21st Annual TMA Northeast Regional Conference

Saratoga Race Course Outing at the 1863 Club at the Rail

## Thursday, August 20th

### Optional Activities for Attendees



The 1863 Club is the newest "must see" hospitality and event facility at Saratoga Race Course. Located at the Clubhouse turn, the 1863 Club offers premium experiences and breathtaking views throughout this three-story facility. Enjoy the afternoon in style from the climate-controlled room or get a front row view of the action from the apron. The space features close proximity to the horse path, an elevated interior providing fabulous sight lines and private betting terminals. Tickets include admission and luncheon buffet. Tickets are limited and will be available through July 31 or until they sell out, so register early.



# Agenda

## Wednesday, August 19th

|                                  |                                                                               |                           |
|----------------------------------|-------------------------------------------------------------------------------|---------------------------|
| 10 a.m. - 2 p.m.<br>& 3 - 6 p.m. | <b>Conference Registration</b><br><i>Sponsored by Pathward</i>                | Saratoga Casino Hotel     |
| 11:00 a.m. - 12:30 p.m.          | <b>Golf &amp; Tennis Check-In</b>                                             | Saratoga Spa Golf Course  |
| 11:00 a.m. - 12:00 p.m.          | <b>Golf &amp; Tennis Lunch</b><br><i>Sponsored by Second Wind Consultants</i> | Saratoga Spa Golf Course  |
| 12:00 p.m. - 5:00 p.m.           | <b>Siege of Saratoga Historical Tour</b><br><i>Sponsored by BCH</i>           | Schuylerville, NY         |
| 12:30 p.m. - 5:30 p.m.           | <b>F. Matthew Jackson<br/>Memorial Golf Tournament</b>                        | Saratoga Spa Golf Course  |
| 1:00 p.m. - 4:00 p.m.            | <b>Tennis Tournament</b>                                                      | Saratoga Golf & Polo Club |
| 6:00 p.m. - 8:00 p.m.            | <b>Opening Reception</b><br><i>Sponsored by Lippes Mathias LLP</i>            | Saratoga Casino Hotel     |

## Thursday, August 20th

|                         |                                                                                                                                                                                                            |                           |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| 8:00 a.m. - 9:00 a.m.   | <b>Continental Breakfast</b><br><i>Sponsored by MidFirst Business Credit</i>                                                                                                                               | Saratoga Casino Hotel     |
| 9:00 a.m. - 10:00 a.m.  | <b>Panel Discussion</b><br><i>Beyond Bankruptcy: Practical Strategies for Out-of-Court<br/>Restructuring and Recovery.</i>                                                                                 | Saratoga Casino Hotel     |
| 10:00 a.m. - 10:30 a.m. | <b>Coffee Break</b><br><i>Sponsored by RJ Reuter Business Consulting</i>                                                                                                                                   | Saratoga Casino Hotel     |
| 10:30 a.m. - 11:45 a.m. | <b>Keynote Speaker</b><br>Afshin Molavi - Geopolitics and Global Economics Expert; Senior<br>Fellow, Foreign Policy Institute at Johns Hopkins University SAIS<br><i>Sponsored by Scouler Advisors LLC</i> | Saratoga Casino Hotel     |
| 11:45 a.m.              | <b>Adjourn to Saratoga Race Course</b>                                                                                                                                                                     |                           |
| 1:00 p.m.               | <b>Post Time at Saratoga Race Course**</b><br>Luncheon buffet is included                                                                                                                                  | The Rail at the 1863 Club |

## Sponsorship

Contact Ralph Aurelia at (203) 377-1527 or [raurelia@pathward.com](mailto:raurelia@pathward.com).

## Registration

Conference registration includes all activities at the Saratoga Casino Hotel: opening reception, breakfast & educational sessions. Golf, Tennis, Tour, Track, Spouse/Significant Other and Room charges are additional (see below). Registered attendees will receive a TMA name badge at check-in that must be worn for admittance to all sessions, meals, and social functions. The member registration is for current, active TMA members. If you are not a TMA member, you may join online at [turnaround.org](http://turnaround.org).

| Conference Registration    | On or before 7/22 | After 7/22 |
|----------------------------|-------------------|------------|
| Member                     | \$325             | \$375      |
| Non-Member                 | \$425             | \$475      |
| Spouse                     | \$200             | \$200      |
| <b>Optional Activities</b> |                   |            |
| Golf                       | \$200             |            |
| Tennis                     | \$150             |            |
| Track Ticket               | \$175             |            |
| Tour                       | \$50              |            |

To **register by mail** (check only), please complete the registration form & mail it along with your check. Registrations cannot be confirmed until payment is received.

## Cancellation Policy

The deadline to cancel for a refund is 5:00 PM on Sunday, August 2, 2026 (the "Cancellation Date"). After the Cancellation Date, no refunds will be granted but substitutions are welcomed. Please consider sending a colleague in your absence, should you need to cancel after the cancellation date. There will be no exceptions.

## Driving Directions

Visit <https://www.saratoga.com/hotspots/saratoga-casino-hotel/directions-and-hours/> for driving directions and property information. The closest major airport is Albany, NY.

## Attire

**Educational Sessions and Networking Events:** Business Casual

**Golf:** Collared shirts, sweaters, cotton pants. No cut-offs, tank tops, sandals.

**Tennis:** Tennis shirts, tennis skirts, tennis shorts and tennis shoes are appropriate dress for the tennis courts. No denim allowed at the club.

**Saratoga Race Course:** Vests, shirts with collars, sweaters, dresses, pantsuits, dress jeans, dress shorts and slacks are appropriate. Jackets/blazers are optional.

# Saratoga Casino Hotel



## Room Reservations

Make room reservations by July 19, 2026 to receive the discounted group rate.

Reserve online: [NERC Room Block](#)

Or call the Casino Hotel at 518-682-8888 and identify yourself as part of the TMA-Northeast Regional Conference when calling.

All reservations must be accompanied by a first-night room deposit. To avoid EARLY CHECKOUT FEES, advise the Hotel at or before check-in of any change in the planned length of stay. All cancellations to room reservations must be made with the resort more than 72 hours prior to arrival to receive the deposit refund.

Please note that the room blocks and discounted hotel rates are for our group and registered conference attendees. If you are not registered for the conference, the discounted rates will not be honored by the hotel.

If you require any assistance with a room reservation, please contact the Upstate New York Chapter Administrator, Kelsey at (949) 238-0907 or [upstateny@turnaround.org](mailto:upstateny@turnaround.org)



IN MEMORY OF

# *F. Matthew Jackson*

Matthew Jackson was a former president and longtime board member of the TMA Upstate New York Chapter and co-chair of the Northeast Conference. He died March 23, 2019, at 49. Mr. Jackson was a partner with O'Connell and Aronowitz LLP in Albany. He left behind his beloved wife of 23 years, Molly, and three children.

"Matt was passionate about his family, his work, his community, and his life," O'Connell and Aronowitz wrote in a posting on the firm's website. "We mourn his untimely death but celebrate the way he lived his life." John Bellardini, CTP, former TMA Upstate New York Chapter President said Jackson especially looked forward to the Northeast Conference each year. "He was gracious with his time. Anytime I called him and asked for some help, he was there," Bellardini said. "Like most people in TMA, he was just a person of quality."

# Chapter Presidents

## 21st Annual TMA Northeast Regional Conference

Hosted by the Connecticut, Long Island, New Jersey, New York, Northeast,  
and Upstate New York TMA Chapters

### Connecticut

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The conference committee would like to acknowledge and extend a special thank you to the chapter executives for their assistance in organizing the 2026 TMA Northeast Regional Conference in Saratoga Springs.

- Marie Shirley - Connecticut & Northeast Chapters
- Betty Mantz - New Jersey Chapter
- Sarah Kuhns - Long Island & New York City Chapters
- Kelsey Walther - Upstate New York Chapter

# 21st Annual TMA Northeast Regional Conference Committee

**Event Co-Chair**

Mark Patchell - Encina Private Credit

**Event Co-Chair**

Joseph A. Heim, CFE, CPA – Culain Capital Management LLC

**Sponsorship Chair**

Ralph Aurelia – Pathward

**Committee-at-Large**

- Madeline Kauffman - Whiteman Osterman & Hanna LLP
- Stacey Alatis – Cadence Business Finance
- Stephen A. Donato – Bond, Schoeneck & King PLLC
- Anne Sinopoli- Rebutia Consulting
- Paul Levine - Lemery Greisler LLC
- George Psomas - Brooks, Houghton & Company, Inc.
- Nolan Aurelia- Amerisource

**With a Special Thanks to our Program Sponsor**



# MIDFIRST BANK

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[Download  
Registration Form](#)



[Online  
Registration Link](#)

## Registration Form

(if registering by mail and paying by check)

Name: \_\_\_\_\_

Name for Badge: \_\_\_\_\_ Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

TMA Chapter: \_\_\_\_\_ TMA Member #: \_\_\_\_\_

Golf: Yes/ No

Golf Handicap (required): \_\_\_\_\_

Tennis: Yes/ No

Tennis Level: \_\_\_\_\_

Conference Registration Fee: \$ \_\_\_\_\_

Golf/Tennis: \$ \_\_\_\_\_

Track Ticket(s): \$ \_\_\_\_\_

Historical Tour: \$ \_\_\_\_\_

Spouse/Guest: \$ \_\_\_\_\_

*Requires Registration form on next page*

TOTAL: \$ \_\_\_\_\_

**Please mail this form along with your check payable to**

TMA Upstate NY Chapter–Northeast Regional Conference to:  
TMA-Upstate NY Chapter, P.O. Box 208, LeRoy, NY 14482

**Questions:** Contact Kelsey Walther, Upstate NY Chapter, at [upstateNY@turnaround.org](mailto:upstateNY@turnaround.org) or (949) 238-0907.

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## Registration Form

(if registering by mail and paying by check)

Guest Name: \_\_\_\_\_

Name for Badge: \_\_\_\_\_ Title: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_