



SFOF Sunday November 13th

Time	Event	Summary	Notes
3:00pm	SFOF Executive Committee Meeting	Invitation Only	<p>Attend, but no prepared speaking expectation</p> <ul style="list-style-type: none"> • <i>DK's suite (details will be texted to you that day)</i> • <i>Derek to lead meeting</i> • <i>It is basically a security briefing for the conference for a handful of people</i>
5:00pm	Registration	<p>As you enter the hotel, registration will be located just off the main hallway on the right, just past the concierge desk. Say hello to our newest staff member Adam Slayton! All attendees should be prepared to show photo identification to receive nametag. You will be required to have your nametag on and visible in order to enter all SFOF meeting rooms.</p>	Speaker: Adam Slayton

6:00pm	Welcome Reception Honoring New State Leaders, hosted by Louisiana State Treasurer John Schroder	The 2022 SFOF Fall national meeting kicks off with a welcome reception honoring all new state leaders. All are welcome to this event with heavy d'oeuvres and food stations. Be sure to visit registration first to pick up your nametag. For security purposes, you must be wearing your nametag and have it visible for entry to the reception.	<p>Business Attire YOU WILL PROVIDE BRIEF WELCOME REMARKS</p> <ul style="list-style-type: none"> • <i>This is a casual, heavy appetizers/bar event, standing only</i> • <i>There will a small raised stage</i> • <i>Derek will ask you and Seth Metcap (Board Chair) to join him on stage</i> • <i>Derek says to SPEAK from your heart 2-3 minutes.</i> <ul style="list-style-type: none"> ○ <i>So excited to be in D.C. with everyone.</i> ○ <i>What a great past year for SFOF.</i> ○ <i>We've accomplished so much and yet still have so much more to do</i> ○ <i>Thank you to all our sponsors (DO NOT MENTION ANY BY NAME, PLEASE)</i> ○ <i>Great that even though we all don't always see eye-to-eye on issues, we all respect and value the relationships built through SFOF</i> • <i>Derek will introduce newly-electeds</i>
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7:45am	Registration	As you enter the hotel, registration will be located just off the main hallway on the right, just past the concierge desk. Say hello to our newest staff member Adam Slayton! All attendees should be prepared to show photo identification to receive nametag. You will be required to have your nametag on and visible in order to enter all SFOF meeting rooms.	

8:00am	Prayer Breakfast for the States	<p>The prayer breakfast for the states is a tradition that started 5 years ago as a way for SFOF's state leaders to build friendships with each other and care for one another. Modeled after the National Prayer Breakfast, SFOF has become a favorite tradition as state financial officers from across the country pause to life up our nation, our states, and our leaders in prayer. This optional breakfast is hosted by Ken Blackwell, led by the state leaders, features musical entertainment and a keynote address by former united states ambassador for religious freedom, Sam Brownback.</p>	Attend, but no prepared speaking expectation
9:15am	Networking Break		
9:30am	SFOF Press Conference, Major Announcement		<p>YOU WILL BE ASKED FOR ANTI-ESG REMARKS (2-3 MINS) AND FIELD ?S FROM REPORTERS</p> <ul style="list-style-type: none"> • <i>Derek will lead the press conference</i> • <i>Release new campaign and play video that shows how the progressive ESG movement is hurting America</i> • <i>Derek will ask Murante to say a few words</i> • Derek will ask JMS to say a few words <ul style="list-style-type: none"> ○ <i>Talk about how ESG is trying to take food off tables, money out of pockets and jobs away from hardworking Louisianans</i> ○ <i>Simply put: I refuse to spend a penny of Louisiana citizens' money with a company that wants to wipe our oil and gas industry off the face of the Earth</i>

			<ul style="list-style-type: none"> You, Derek and Murante will answer questions from the media re: ESG
*Throughout day	One-on-one media interviews		<ul style="list-style-type: none"> CRC and Derek may coordinate sit down interviews for you with media outlets (FOX, OAN) who request them. Topic will be Anti-ESG
10:00am	Straight Talks	<p>Treasurer John Murante will open our national meeting with the first straight talk! These short 10-12 minute informative talks are designed to educate and give insights to the individual's experience and expertise.</p> <p>Stephen Soukup will immediately follow Treasurer Murante. Stephen is the author of "The Dictatorship of Woke Capital: How Political Correctness Captured Big Business."</p>	Attend, but no prepared speaking expectation
10:30am	Panel Discussion: Protecting Taxpayer Dollars from Inflationary Pressures Throughout the 2022 Recession	<p>Hear the discussion as our expert panelists discuss the state of our economy, how inflationary pressures have brought us to this stage, and what conditions can do to safeguard tax dollars during the recession – hosted by Missouri Treasurer Scott Fitzpatrick featuring Steven Chiavarone, CFA, Federated Hermes, Andy Puzder, Heritage Fellow, (and SFOF Honors Lifetime Achievement Award 2022 Recipient) and Johnathan Williams, American Legislative Exchange Council (ALEC).</p>	Attend, but no prepared speaking expectation
11:30am	Networking Break	<p>Enjoy this 30-minute networking break. Attendees are welcome to stay in the grand ballroom but we ask that you remove all your</p>	Attend, but no prepared speaking expectation

		personal items and materials from the table so hotel staff can set the tables for lunch.	
12:00pm	Lunch and Keynote Presentation: A Post-General Election Update	Will Republicans win back the house of representatives? How about the senate? And how did state financial officers do throughout the country? Leslie Graves, Executive Director of Ballotpedia will provide very interesting insight into the November 8 th general election. There will also be a few special presentations by Derek Kreifels, CEO of the State Financial Officers Foundation.	Attend, but no prepared speaking expectation
1:00pm	Panel Discussion: The Rising Threat of China and the CCP	In 2022 the world saw Russia invade Ukraine. Within days a majority of US states divested any investments with ties to Russia. If China were to invade Taiwan, should they be ready to divest from china? How is China's CCP working to undermine the US? What's the connection between China and ESG investing? You won't want to miss this discussion hosted by Pennsylvania Treasurer Stacy Garity. Panelists will include Heritage Actions Executive Director, Jessica Anderson and Commissioner Bob Borochoff from the US – China economic and Security Review Commission.	Attend, but no prepared speaking expectation
2:00pm	Straight Talks	Enjoy two more straight talk presenters: Jon Coleman, Author of Harvard Business Reviews Guide to Crafting Your Purpose and Managing Partner of Sovereign Wealth Capital. And West Virginia Treasurer Riley Moore.	Attend, but no prepared speaking expectation

2:30pm	Panel Discussion: Fostering True Diversity in Non-Profit Organizations and Cooperate America	Diversity has become an important buzzword adopted by many cooperate boardrooms and non-profit organizations. But what is ‘true’ diversity? Are corporations that penalize employees for expressing their viewpoints or religious beliefs really embracing diversity? You won’t want to miss this panel discussion hosted by South Carolina Treasurer Curtis Loftis, and featuring Stephanie Holmes, Patrice Onwuka, Independent Women’s Forum, and Jeremy Tedesco, Alliance Defending Freedom.	Attend, but no prepared speaking expectation
3:30pm	Panel Discussion: Maximizing your Unclaimed Property Returns	<p>What can States do to return more money to owners? How can states better promote and educate the public about their unclaimed property programs? Come here for answers to all of these questions and more.</p> <p>Panel Discussion hosted by Louisiana Treasurer and SFOF National Chair John Schroder. Featuring Lindsay Caldonetti, Kelmar, Joseph Marcelonis from Kroll Financial Services, and West Virginia Treasurer Riley Moore.</p>	<p>YOU WILL MODERATE THIS PANEL (UCP BULLETS ARE PROVIDED, IF YOU CHOOSE TO USE THEM).</p> <ul style="list-style-type: none"> • <i>You are the moderator with a rep from Kelmar, rep from Kohl and WV Treasurer Riley Moore (just added) as panelists</i> • <i>Please do not read full bios. Encourage audience to read about them on the event app so there’s more time to pick their brains about UCP.</i> • <i>You must arrive backstage no later than 3:15 p.m. to get mic’ed up.</i> • <i>I have prepared some UCP bullets for you, in case you’d like to use them</i> • <i>You are the timekeeper. There will be a countdown clock visible from the stage for you to see.</i> • <i>If there’s extra time, there will be runners in the audience with wireless mics and you can call for questions from audience members.</i>
4:30pm	Break		

6:30pm	General Reception	Reception for all conference attendees at the Mayflower Hotel's Grand Ballroom. Nametag is Required for entrance to ballroom.	Attend, but no prepared speaking expectation
7:00pm	10 th Anniversary Dinner	Join us as we continue 10 th anniversary celebration with our big event! Join your hostess media personality Mary Katherine (Ham) Fountain as she guides us through an evening of laughter, leadership and inspiration. Don't forget your nametag, all attendees welcome.	<p>YOU WILL PRESENT YOUR SPEECH</p> <ul style="list-style-type: none"> • Formal, sit down dinner with cocktail hour preceding • Derek will open, thank dignitaries and special guests, show videos and then ask everyone to eat • Emcee (Mary Katherine who attended NOLA event at WWII Museum) will ask you to stage to give your speech • Derek is sent me a list of all your fellow financial officers (please don't use "treasurers") for you to ask to have them stand and be recognized at the start of your speech. They are now included in your speech. • He thinks your speech is great.

SFOF Tuesday, November 15th

Time	Event	Summary	Notes
7:45am	Load Busses to Heritage Foundation	Please load the busses located at DeSales Street side entrance just off the main lobby of the hotel. Breakfast will be served at the Heritage Foundation. If you're checking out of the hotel this morning, feel free to bring your luggage with you on the bus. You will be able to store your luggage at the heritage foundation until lunch temporarily.	Attend, but no prepared speaking expectation
8:15am	Breakfast		
8:30am	Straight Talk	Wrapping up our Straight Talk series is the Honorable Jason Issac, Director of Life: Powered – A project of the Texas Public Policy Foundation.	Attend, but no prepared speaking expectation
8:45am	ESG Part 1: The Continued Battle Against ESG Investigating	Panel discussion hosted by Andy Olivastro, Vice President of Outreach, The Heritage Foundation, US Rep. Andy Barr (KY-6), Will Hild, Executive , Consumers Research, and Derek	Attend, but no prepared speaking expectation

		Kreifels, CEO, State Financial Officers Foundation.	
9:45am	ESG Part 2: Shareholder Proposals and Voting Your Proxies	Utah Treasurer Marlo Oaks talks to three experts about how shareholder proposals are being used to advance a social agenda and what sales can do to stop it. Come here steps states can take to begin to take back their proxy votes. What do experts anticipate from the next shareholder season? Don't miss this valuable session with Jerry Bowyer, Steve Milloy, and Scott Shepard.	Attend, but no prepared speaking expectation
10:45am	ESG Part 3: The Legal Argument for Fiduciary Responsibility	Panel discussion hosted by Kentucky Treasurer Allison Ball, Carmine Laccarino, Chief of Staff and Counsel, Kentucky Office of Attorney General, and David Johnson, Executive director, Rule of Law Defense Fund.	Attend, but no prepared speaking expectation
11:45am	Closing Keynote: Vivek Ramaswamy	Back by popular demand, Vivek Ramaswamy (SFOF Honors Lifetime Achievement Award 2022), author of Woke., Inc., and Victim of Nations will conclude our conference with his message of hope, capitalism, and American exceptionalism.	Attend, but no prepared speaking expectation
12:15am	Closing Lunch	For security purposes, our lunch location will be announced from the Heritage Foundation on Tuesday morning.	
1:15pm	Optional Bus back to Hotel	One bus will take any conference guests that need to go back to the mayflower hotel immediately following lunch.	
1:30pm	State Leaders and Staff Meeting	Invitation Only	Attend, but no prepared speaking expectation <ul style="list-style-type: none"> • <i>You do not have an official speaking expectation</i> • <i>However, you'll be seated next to Marlo, the chair you appointed as Policy Chair. He will run the meeting.</i>

4:30pm	Load Busses Back to Hotel	Busses will take state leaders, staff, and invited guests back to the Mayflower following the state leaders and staff private meeting.	
6:30pm	Private Dinner	Invitation Only	Attend, but no prepared speaking expectation