

2024 EXECUTIVE LEADERSHIP CONFERENCE

APRIL 17-18, 2024 | HARD ROCK HOTEL & CASINO ATLANTIC CITY, NJ



THE POWER OF PARTNERSHIP: Tools for Strengthening Your Business



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ANTITRUST GUIDELINES

While some activities among competitors are both legal and beneficial to the industry, group activities of competitors are inherently suspect under the antitrust laws. Agreements or combinations between or among competitors need not be formal to raise questions under antitrust laws, but may include any kind of understanding, formal or informal, secretive or public, under which each of the participants can reasonably expect that another will follow a particular course of action.

Each of you is responsible to see that topics which may give an appearance of an agreement that would violate the antitrust laws are not discussed at your meetings. It is the responsibility of each participant in the first instance to avoid raising improper subjects for discussion. This reminder has been prepared to assure that participants in meetings are aware of this obligation.

The Do's and Don'ts presented below highlight only the most basic antitrust principles. Each participant in a meeting should be thoroughly familiar with his/her responsibilities under the antitrust laws and should consult counsel in all cases involving specific situations, interpretations, or advice.

DON'T

1. Do not, in fact or appearance, discuss or exchange information regarding:
 - a. Individual company prices, price changes, price differentials, markups, discounts, allowances, credit terms, etc., or data that bear on price, e.g., costs, production, capacity, inventories, sales, etc.;
 - b. Industry pricing policies, price levels, price changes, differentials, etc.;
 - c. Changes in industry production, capacity or inventories;
 - d. Bids on contracts for particular products; procedures for responding to bid invitations;
 - e. Plans of individual companies concerning the design, production, distribution or marketing of particular products, including proposed territories or customers;
 - f. Matters relating to actual or potential individual customers or suppliers that might have the effect of excluding them from any market or of influencing the business conduct of firms toward such suppliers or customers.
2. Do not discuss or exchange information regarding the above matters during social gatherings incidental to meetings, even in jest.

DO

1. Adhere to prepared agendas for all meetings and object any time meeting minutes do not accurately reflect the matters which transpired.
2. Understand the purposes and authority of the group.
3. Consult with counsel on all antitrust questions relating to meetings.
4. Protest against any discussions or meeting activities which appear to violate the antitrust laws; disassociate yourself from any such discussion or activities and leave any meeting in which they continue.

SCHEDULE AT A GLANCE

WEDNESDAY, APRIL 17

Time	CE Credits	Presentations
4:30 p.m. - 5:30 p.m.		Owners and Managers Roundtables
6:30 p.m. - 8:30 p.m.		Opening Reception at Hard Rock Café Backstage

THURSDAY, APRIL 18

9:00 a.m. - 9:30 a.m.		Registration & Breakfast
9:30 a.m. - 11:00 a.m.	1.5	<i>2024–2025: A Changing Landscape</i> <i>Jeremy Bess, ITR Economics</i>
11:00 a.m. - 11:15 a.m.		Break
11:15 a.m. - 12:15 p.m.	1.0	<i>Legal, Legislative Issues and the 2024 Elections: What It All Means for the Staffing Industry</i> <i>Toby Malara, American Staffing Association</i>
12:15 p.m. - 1:15 p.m.		Luncheon
1:15 p.m. - 2:15 p.m.	1.0	<i>Bracing for Change: Strategizing for the Impending AI Revolution</i> <i>Tim Robbins, ConverzAI</i>
2:15 p.m. - 3:15 p.m.	1.0	<i>10x Sales Acceleration: Using Marketing to Reimagine Your Staffing Sales Process</i> <i>David Searns, Haley Marketing</i>
3:15 p.m. - 3:30 p.m.		Break
3:30 p.m. - 4:30 p.m.	1.0	<i>Captivating the Lens: Mastering the Art of Public Speaking on Camera for the Digital/Video Era</i> <i>Kerry Barrett</i>
4:30 p.m. - 4:45 p.m.		Closing Remarks
4:45 p.m. - 7:00 p.m.		Closing Cocktail Reception (DAER Night Club – 3 rd Floor)

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Dedicated to the staffing industry.



Webster Bank's comprehensive payroll finance outsourcing solution provides a full range of services from front to back end, so you can leverage your time and talents to focus on what matters most: Helping your business thrive.

Dedicated to helping staffing companies succeed for over 30 years, we're one of the leading providers of financing and administrative services for staffing firms nationwide. We welcome the opportunity to become yours too.

A team of experts through a dedicated Relationship Manager

At Webster Bank, your Commercial Services Relationship Manager works in partnership with a client service team of experienced financing specialists who are more than familiar with your business- they're experts in it. Together, they provide you with access to a full range of financial resources and online conveniences to meet your needs.

Flexible financing to facilitate growth

At Webster Bank, we understand lending isn't a one-size-fits-all solution so we offer financing options to meet specific needs:

- **Payroll finance and processing**, ideal for firms looking to maximize efficiency with a comprehensive back-office support, financial reporting and funding solution.
- **Accounts receivable financing**, which gives established firms with limited capital resources access to up to 90 percent of their assigned invoices together with timely collections and cash processing.
- **Asset-based lending**, a traditional banking product that leverages our in-depth understanding of the staffing industry to enable companies to achieve their growth or acquisition goals.



See how Webster Bank can help your business thrive. For more information about payroll solutions through our Commercial Services Division, visit snb.com/commercial-services.

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simplifying your business

There's more to running a business than managing finances, translating tax language and building business strategy. Find out how Withum helps staffing companies put more time and effort into people, not process.

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Fueling Growth for Staffing Firms with Tailored Finance Options

BUILD ON YOUR ACCOMPLISHMENTS. REACH HIGHER.

Is your staffing firm expanding into new markets? Growing rapidly? Adding new service capabilities? Whatever your vision, Access Capital helps get you there. As the nation's leading independent lender to the staffing industry, we provide working capital solutions through asset-based loans ranging in size from \$1 million to \$25 million.

Where is Your Business Going Next?

We provide the financial support and strategy your company needs to:

- Reach the next level of growth
- Access industry expertise
- Support longer receivable cycles
- Boost liquidity
- Finance management buy-outs
- Leverage recapitalization
- Expand into new market
- Facilitate strategic acquisitions

I wholeheartedly endorse Access Capital to any staffing company seeking a lending partner that understands the intricacies of the industry and delivers tailored financial solutions with unwavering reliability and exceptional service. Their industry knowledge, combined with a proactive and communicative approach, ensured their client's financial requirements are met and more.

Rosa Padilla
CPA, Principal, RLP, CPA LLC

Access Capital Services

Achieve more with our simple, scalable funding solutions.

ASSET-BASED LENDING

Tailored, consultative, and "no factoring" payroll funding options give you more flexibility to maximize your most ambitious opportunities.

TERM LOANS

Leverage loans customized to your needs to fund recapitalization, shareholder buy-outs, and business expansions.

M&A FINANCING

Use our financing solutions to expand into new markets, facilitate mergers, and acquire assets to grow your business.

Our Clients

Our staffing industry clients work in range of industries, including:

- Finance & Accounting
- Healthcare
- Legal
- Light Industrial
- IT & Engineering
- And more!



John McGraw
Business Development Officer
jmcgraw@accesscapital.com



Paul Mehring
Chief Lending Officer
pmehring@accesscapital.com



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FOCUS ON
WHAT COUNTS:
YOUR MISSION**

**With over 200 clients
in the staffing space,
Citrin Cooperman is the nation's
largest provider of accounting,
tax, and business advisory
services to the staffing industry.**

New Jersey Contacts:



Michael Napolitano, CPA
Staffing Co-Leader
Audit

✉ mnapolitano@citrincooperman.com



Anthony Nunez, CPA,
Staffing Manager
Tax

✉ anunez@citrincooperman.com

HELPING OUR CLIENTS THRIVE WITH:

- Income Tax Consulting & Financial Statement Preparation
- Staffing Industry Merger & Acquisition
 - Due Diligence
- Business Advisory & Outsourcing Solutions (BPO)

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AGR Financial works **exclusively** with staffing companies throughout the country.

Since we focus **solely on the staffing and temporary personnel industries**, we have the expertise to craft customized solutions to meet the specific needs of our clients. We understand your business and its unique challenges.

Our clients benefit from one-stop shopping with a financial firm (not a big bank) that can not only provide industry-specific consulting advice, but an institution that will directly provide financing with the capacity to take its own equity positions.

Our Services

- ***Accounts Receivable Funding & Financing*** — Advances are made against your company's customer invoices to provide the cash flow required to fill the gap between when your staffing firm provides contractors and when your customer pays. Advances are arranged on a sliding scale, up to 90 percent. This helps businesses to determine cash flow needs from week to week. **Lower rates are provided as a reward for high-volume growth.**
- ***Payroll Funding & Financing*** — A sophisticated Payroll Funding program such as AGR's, enables you to utilize the invoices that you send out and receive an advance of up to 90 percent of the face amount of the invoice. This will free up your cash flow to make payroll or to cover other expenses that are needed.
- ***Complete Funding & Financing Needs*** — Every business day AGR Financial keeps funds flowing along predictable lines — smoothly, seamlessly, effortlessly — freeing you from weekly financial worries, enabling you to concentrate on the best ways to operate and grow your core business.

Benefits of partnering with AGR

- Almost 30 years of industry expertise — we understand your challenges
 - Advances up to 90% of invoice amount
 - **No banking restrictions or covenants**
 - Sliding rate structure rewards sales growth
 - No hidden costs or extra fees
 - Free up your own funds for non-business activities
 - Total confidentiality
 - Optional web based reporting
- Merger & Acquisition Services (Sell – Acquire – Merge – Restructure)
 - Solutions for Start-up and Independently owned staffing firms
 - Assistance acquiring Workers Comp

Looking to buy or sell?

- Many companies also call on AGR Financial to share extensive expertise and guidance through our **Merger and Acquisition Consulting and Brokerage.**
- Our M&A consulting clients can draw on the full resources of our company to find the right solution for their challenges.

For immediate information please contact **G. Allen Geyer**, Managing Member or **Evan Prodromo**, President

(eprodromo@agrfinancial.com) **732-572-0568** or visit our new and updated website

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A background check company designed for the staffing industry.



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Trusted Advisors uniquely committed to the Staffing Industry

Our national staffing practice is recognized as one of the largest in the country. Our clients span the spectrum of the industry in terms of size, ranging from smaller highly specialized firms to large publicly traded staffing companies. In terms of market sectors, our staffing clients focus in a variety of areas including light industrial, professional services (legal, accounting and finance), IT, healthcare, engineering and commercial.

We have nine professionals that dedicate a material portion of their practice to the staffing industry. Our team counsels management on major strategic and operational issues impacting their business. In this regard, we regularly offer advice on:

- Business structure
- Client contracts focusing on indemnification & key risk provisions
- Compensation strategies & plans
- Emerging legal and business issues
- Human resources
- Litigation
- Merger & Acquisitions
- On and Off Boarding
- Regulatory compliance

Our dedication to understanding and advising the staffing industry delivers tangible benefits to our clients and the staffing industry.



Dedication to Understanding the Staffing Industry

The staffing industry and the regulations impacting it are complex and constantly evolving. At Becker, we are dedicated to following the regulatory and business developments impacting our clients.

We keep abreast of these developments through the Staffing Industry M&A Market Insiders, attendance at all of the major industry conferences, thought leadership, and our board membership for various staffing associations.

This dedication to understanding your industry helps us guide you on the best legal practices that will help you grow and insulate your company from liability.

For more information contact:

Martin L. Borosko, Esq.
Managing Partner
mlborosko@becker.legal
Direct: 973-251-8921

Michael A. Bartels
Chief Development Officer
mbartels@becker.legal
Direct: 973-251-8905

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World Wide Specialty Programs, Inc.
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- ◆ Save Time with Administrative Support
- ◆ Increase Operational Efficiency
- ◆ Scale Your Workforce
- ◆ Decrease Employer Liability
- ◆ Multi State Payroll
- ◆ Save Money


To learn more, please reach out to Ben Schwing—Director of Sales Northeast.
(609) 744-9875

ben.schwing@cornerstonepeo.com



Marketing solutions
for the staffing industry.

It's all we do.[®]



If your marketing efforts have lost traction or are stalled altogether, perhaps it's time to partner with someone who understands the staffing industry – and is fully aware that every staffing firm faces unique challenges that require custom solutions.

At TerraFirma Marketing, we develop custom marketing strategies that drive results. Even our name, TerraFirma, which translates to “solid ground,” reflects our mission to deliver results based on a solid and sustainable foundation. Let us create a marketing strategy that works for your staffing organization.



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THE TRUSTED SCREENING PARTNER

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STAFFING

Supporting Your Hiring Process From Start To Hire

Asurint is leading the background screening industry forward. Our powerful, customizable technology—backed by expert answers and personalized assistance—helps employers hire the right candidates every time, and faster than ever before.

Our clients leverage better background checks to reduce manual workloads, minimize compliance risk, promote a safer workplace, and drive insights to boost hiring and recruitment success.

THE ASURINT ADVANTAGE

AUTOMATION

Asurint's technology takes the manual work—and the guesswork—out of background checks. Facilitate rapid candidate consent. Conduct the best search for each individual. Automatically flag records requiring your attention. And streamline the Adverse Action process. **Start-to-finish automation lightens the burden on your team** so you can focus on strategic goals.

RESULTS

Asurint owns, aggregates, and manages the data for our background checks. Unique relationships with thousands of courts across the country ensure better records coverage, more frequent data updates, and faster results—including near-immediate reporting from our Instant Clear technology. With Asurint, you **get a more complete picture of each candidate and secure and onboard top talent** ahead of the competition.

COMPLIANCE

Federal, state, and local laws are always changing, but Asurint can help you keep up. Gain access to our compliance experts to answer any question. By leveraging Asurint solutions, you **minimize human error, mitigate risk, and avoid costly penalties** in a complex and confusing legal landscape.

SUPPORT

Asurint's Screen Team is always here to help. With our 100% U.S.-based client service, flexible support solutions, and access to industry thought leaders, **we put unparalleled subject matter expertise and full-service background search assistance at your fingertips.** You can trust Asurint to be your resource for solving any employment screening problem.

INTEGRATIONS

Experience all the advantages of Asurint background checks from within your ATS or HRIS. **We integrate with your existing technology and also with your team, offering rapid onboarding and comprehensive training.** When background screening is easier and more intuitive, you save both time and effort. Suddenly, your most ambitious hiring objectives are possible.

ASURINT AT A GLANCE



13 of SIA Top 25

GLOBAL STAFFING FIRMS TRUST ASURINT FOR BACKGROUND SCREENS



< 24 hours

AVERAGE STAFFING TURNAROUND TIME FOR REPORTS COMPLETED



10%

BONUS DATA



20%

HIGHER HIT RATE



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BACKGROUND SCREENS ANNUALLY



27 seconds

AVERAGE WAIT TIME



100%

U.S.-BASED SUPPORT

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ASURINT
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Customized Solutions for Staffing

Think about how many hours you spend per week on the administrative details of running your business. Now, multiply that by a month. A year.

Wouldn't that time be better spent on activities that drive revenue?

RLP, CPA LLC works closely with staffing companies to provide outstanding accounting, back-office support, and controllership services. We are staffing company specialists and have been serving the industry since 2000.

Services We Provide for Staffing Firms

Accounting:

- Bookkeeping
- Financial Reporting

Back Office Support:

- Internal Staff Assistance
- Controllership Services
- Managing Accounts Payable and Accounts Receivable
- Payroll and Billing
- System Selection and Implementation

About RLP, CPA LLC

With more than 30 years of combined experience in the staffing industry, RLP provides accounting, back-office support, system implementation, best practices, and controllership services to the staffing industry. Our goal is to build trust with our clients and guide them to a future of financial health.

RLP's CEO, Rosa Padilla, is a Certified Public Accountant with over 20 years of service in corporate accounting, primarily in the staffing and recruiting industry. After graduating from New Jersey City University with a Bachelor of Science in accounting, she became the accounting manager of a publicly traded staffing company within five years of graduation. Next, she continued her management career and became controller of a \$320M staffing company before earning her CPA and founding RLP, CPA LLC.

Rosa is a member of the American Institute of Certified Public Accountants, the New Jersey Society of Certified Public Accountants, and the New Jersey Staffing Alliance.

Take Control of Your Business

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Faster Growth, Flexible Solutions for Your Staffing Company

Running any business can be hard—but staffing companies like yours are faced with unique operational and business needs. From compliance to payroll to employee retention, your company has specialized concerns. Wouldn't it be nice to have a partner who understands your industry?

Vensure Staffing Alliance is ready to help.

Backed by 100 years of combined human capital management experience, Vensure Staffing Alliance (VSA), has created an exciting staffing-focused support program to help companies like yours grow and thrive.

You'll work exclusively with a team of staffing-focused experts who understand the industry and who get to know what your company is all about.



Ready to learn more?

Contact us at 800.409.8958 to speak with a business consultant.

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VensureHR
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