



**institute for  
supply management**

**INSTITUTE FOR SUPPLY MANAGEMENT NEW YORK/NEW JERSEY FORUM  
8TH ANNUAL CONFERENCE  
PREPARE FOR THE FUTURE: YOU & YOUR ORGANIZATION  
BINGHAMTON, NEW YORK  
November 7 - 8, 2008**

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**Contacts For More  
Information:**

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**We will be offering the  
CPSM Bridge Exam on  
Friday, November 7, 2008  
8 a.m. – 11 a.m.  
Examinees arrive 7:15 a.m.  
Registration deadline:  
10/15/08**

**A Message from the Forum Chair:**

ISM NY/NJ is a forum of the Institute for Supply Management (ISM), which is a national organization located in Tempe, AZ. Our forum is made up of fourteen ISM affiliates located in New York and New Jersey. Our mission is to assist in our members' development and professional networking so that they can add value in the Supply Management and Purchasing professions. We do this by providing professional development and leadership training programs on a regional basis.

Our eighth conference will be held November 7<sup>th</sup> and 8<sup>th</sup>, 2008 in Binghamton, New York. As a highlight we are offering the opportunity to take the CPSM bridge exam prior to the conference. You can take the exam and then discuss the program with fellow Supply Chain Management practitioners and CPSM's.

This year's conference focuses on "Leadership, Educational, and Personal Improvement" topics. This year topics were planned and developed from the input of our forum members. Our goal is to provide each person attending the conference with information and knowledge that they can use to help them achieve success in today's business environments. We have engaged top quality speakers and are providing this to our members at a very affordable cost. We believe that keeping the cost to a minimum will allow a greater number of participants to attend this dynamic weekend of Professional Development. This is an excellent opportunity for meaningful networking with your peers from across the region and a chance to make new friends while renewing the old ones.

The facility is located on the Chenango River in downtown Binghamton and offers walking paths, an indoor pool, and a fitness room. There is a very good restaurant in the facility and many more within very close proximity.

The conference team promises to provide you with excellent professional development programs, lots of fun and enjoyment, and the opportunity to interact with your peers while attending a great conference.

Help us keep our annual conference tradition for Supply Management and Purchasing Professionals in our region strong by attending. Don't miss out on learning from this year's speaker. Register early!

Guy E. Haddix CPSM  
Chair, ISM NY/NJ Forum



## ISM NY/NJ Forum Conference Schedule

<b>Friday November 7th</b>		
7:15 a.m. - 11:00 a.m.	CPSM Bridge Exam (must register by October 15, 2008)	
Noon - 12:20 p.m.	Welcome, Intro, Housekeeping Guy Haddix, CPSM, ISM NY/NJ Forum Chair Terry McLaughlin, ISM NY/NJ Forum Facilities	
12:30 p.m. - 2:00 p.m.	General Session #1 Gareth Thomas, President Group Procurement and Physical Supply chain for EMI Music Topic: Prepare for your future: you and your organization	
2:15 p.m. - 3:30 p.m.	Round Table Discussions ? Affiliate Leadership- Larry Clark, C.P.M. ? Affiliate Opportunities - Ed Riggie, III, C.P.M. <ul style="list-style-type: none"> <li>• ISM Social Responsibility -Kathy Perna</li> <li>    <ul style="list-style-type: none"> <li>• CPSM - Guy Haddix, CPSM</li> </ul> </li> </ul>	
3:45 p.m. - 5:00 p.m.	General Session #2 Career Insurance Gary Pezzuti, Summit Group	
6 p.m. - 7 p.m.	Networking Opportunity	
7 p.m.	*Buffet Dinner/Night at the Races Charity Event	
<b>Saturday November 8th</b>		
	<b>Track 1</b>	<b>Track 2</b>
8:30 a.m. - 10 a.m. (Growth Tracks)	Legal Costs of Purchasing (1A) Jim Bergman, GSM	Low Cost Supplier Sourcing (1B) Leslie Madigan, Invitrogen
10:15 a.m.-11:45 a.m. (Financial Tracks)	Energy Cost Control (2A) Mike Farrell, Constellation NewEnergy	Import/Export Compliance & Procurements Responsibility (2B) Jim Fox, Avoxx Systems
Noon - 1:45 p.m.	Luncheon Speaker/Topic: Prepare for your future: You & Your Organization Jim Bergman, Global Supply Management, Inc.	
2 p.m. - 3:15 p.m. (Career Tracks)	Improving Business Communications (3A) Larry Clark, C.P.M.	How to use Microsoft Office Products (3B) Gerald MacDonald, C.P.M.
3:30 p.m. - 4:45 p.m.	General Session #3 Back to the Basics: A Review of the Top-Down Planning Hierarchy Michael Ford, TQM Works, Consulting	
4:45 p.m. - 5 p.m.	Session Recap: Guy Haddix, CPSM, ISM NY/NJ Forum Chair	
6 p.m. - 7 p.m.	Networking Opportunity	
7 p.m.	Awards Dinner Dress: Business Formal (Jacket & Tie)	

*\*Buffet Dinner/Night at the Races Charity Event - please note alcoholic beverages will be available. \*Speakers subject to change*

*\*\* Meals included in registration fee: Friday buffet dinner; Saturday lunch and dinner.*

## Round Table Discussions

There will be three round table discussions: Affiliate Leadership facilitated by Larry Clark, C.P.M.; Affiliate Opportunities facilitated by Edward Riggie, C.P.M.; ISM Social Responsibility facilitated by Kathy Perna and CPSM – Feedback on the exam facilitated by Guy Haddix, CPSM.

## General Sessions

### Career Insurance

This session will provide you with the tools and instruction on how to think and therefore present your expertise in *disciplines...* rather than jobs or titles. In the process you will come to know how much you really do know as well as how versatile and transferable your experience is. With this deeper appreciation you become more effective in your profession and for your employer... and to actually apply your **ISM** education. Additionally, these exercises and discussions are designed to assist you in gathering additional insights to your career options as you attend subsequent sessions during the conference. Understanding and appreciating your experience and knowledge will expand your horizons and aid in your career planning. As you listen to presenters and chat with the other attendees during the next two days you will continually be expanding your 'professional inventory' and contemplating career options... and making important Career Insurance Premiums.

### Prepare for Your Future – You and Your Organization

Prepare For The Future. The supply management professional faces many uncertainties related to the future – from the risks faced, the rewards to be captured, as well as the talents and tools needed to succeed. While the future is never perfectly predictable, we will address where leading practice organizations are heading. This session will look at recent trends in:

- Leading practices in supply management
- Innovation and collaboration
- Technology, automation and tools
- Globalization and offshoring
- Outsourcing in insourcing
- Talents and skills

### Back to Basics: A Review of the Top-Down Planning Hierarchy

A basic review from Vision/Mission through all levels of planning.

Our daily tasks often involve last minute expediting, fighting fires, resolving quality issues, dealing with personnel and just trying to get to the end of a day. This presentation serves to remind us that we have a higher level mission to fulfill and the tie-in between strategic plans and operational tasks. When we utilize an effective game plan that is structured to support our mission, execution at lower levels is more easily facilitated. Participants will review each level as follows:

- Vision/Mission Statement
- Corporate Strategy
- Business Planning
- Sales & Operations Planning
- Master Scheduling
- Material Requirements Planning

Highlights will include discussion of core competencies, functional roles, demand management, "The Six Boxes" that represent MRPII priority and capacity plans, and closing the loop. In addition to serving as a refresher for operations management, this presentation will be of great benefit to the many functions possibly unfamiliar with the TOTAL scope of planning: top management, purchasing, marketing & sales, engineering, human resources, information systems, distribution, etc. Bring an entire crew of mid-level managers representing all these functions to obtain the best value-added benefit!

## Breakout Sessions

### Growth Tracks:

#### Legal Costs of Supply Management

The boiler plate terms and conditions in a procurement contract are often negotiated in somewhat of a financial vacuum. We often allocate the risks in these provisions without full understanding of their costs. This session will examine the costs, both direct and indirect, associated with some of the more frequently negotiated terms including:

- Insurance
- Indemnity
- Warranty
- Choice of Law
- Change Orders
- Payment Terms
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#### Low Cost Country Sourcing

In this session we will be addressing the following:

- Market Trends
- Tools for analysis
- Product Quality
- Total Acquisition Costs: Cost adders for LCC
- Cost Savings

### Financial Tracks:

#### Energy Cost Controls

Areas/Concepts to be covered in this session include:

- Background on natural gas and electricity in WNY
- Energy Deregulation: past, present & future
- Energy Cost Drivers/Market forecast
- Green Energy
- Purchasing Energy is not like purchasing office supplies-Tips on how to avoid the pitfalls of the low cost bidder syndrome
- Dispelling the myth that aggregation means getting a better price
- How to avoid/eliminate an extra layer of cost – Understanding the shallow value depth of a consultant/middleman
- Summary - Best cost practices segmented by usage size

#### Import/Export Compliance & Procurement's Responsibility

- US Export Laws and Regulations (US Department of Commerce, State and more)
- Basic review of your company products under export regulations
- Confidentiality
- Steps to Establish a Relationship with a foreign supplier
- Steps to Maintain a Relationship with a foreign supplier

### Career Tracks:

#### Improving Business Communications

Due to poor communication practices, misunderstandings and errors occur that have a negative impact on the bottom line. In this session we will take a look at improving e-mails, reports and phone conversations to save time and improve efficiency for supply managers.

**How to Use Microsoft Office Products** – this session will explain in detail the various aspects of the Microsoft Office Suite programs.

## PRESENTERS

**Jim Bergman**, serves as CEO of Global Supply Management, Inc and President of Purchasing Law and Negotiations, Inc. (PLAN). Prior to establishing PLAN, Jim was a contracts attorney for Amoco Corporation, responsible for legal and negotiations support to a staff of sourcing specialists and supplier account managers. He supported multiple locations throughout the U.S., where he addressed strategic sourcing and legal issues concerning commodities and services valued at more than \$1 billion annually. In addition to his efforts at Amoco, Jim has developed additional experience as the Director of Consulting and Director of On-Site Training at a consulting and training firm based in Florida. Jim's experience encompasses developing, negotiating and managing contracts for a wide array of sourcing projects with multiple clients. He has extensive background in the negotiation and sourcing of desktop systems, software, system integrators, mainframe systems, telecommunication networks, printers, peripherals, computer supplies, as well as office furniture, equipment, supplies, MRO, process chemicals, engineered equipment, fleet, dispensers, packaging, scaffolding, insulation, waste services, janitorial, landscaping, security services, logistics services, warehousing, and engineering and construction services, plus leasing.

**Lawrence J. Clark, C.P.M.** is a past chair of the NY/NJ forum and a member of NAPM-Rochester where he served as president in 1994. He has done numerous dinner meeting programs for our member affiliates. He has also presented papers at the ISM International Conference and edited a chapter on Value Analysis in the *Supply management Handbook, 6<sup>th</sup> and 7<sup>th</sup> editions*. Mr. Clark has won the highest award of both NAPM-Rochester (Kron Award) and ISM-NY/NJ forum (Erlicher Award) for his contributions to the profession. He has 19 years experience in Supply Management, serving as a buyer, purchasing manager and materials manager for Burleigh Instruments in Fishers, NY. In 2001 he returned to teaching and coaching at Sodus High School in Sodus NY. He has MS degree from S.U.N.Y. Oswego.

**Mike Farrell**, is the Business Development Manager for Constellation NewEnergy, guiding National Grid, NYSEG, RG&E, & NFG corporate customers on energy price risk management strategies and energy rate analysis. He brings a wealth of knowledge to the role, providing his expertise in the Natural Gas and Electricity industry to Upstate New York end users since the beginning of deregulation. Prior to his present position, Mr. Farrell served as Regional Account Executive for Niagara Mohawk Energy Marketing, National Fuel Resources and Vice President of Exploration for Envirogas Inc., a natural gas producer based in Hamburg, New York. Mike is a graduate of SUNY Fredonia and holds a Bachelor of Science in Geophysics. He is a member of the Association for Facilities Engineering (AFE) (Rochester Chapter 21) and on the Board of Directors for Greater Buffalo BOMA (Building Owners and Managers Association). He resides in Hamburg, NY with his wife and three children.

**Michael D. Ford**, CFPIM, CSCP, CQA, CRE, EI, QI, is Principal of TQM Works Consulting. He provides innovative solutions based on 22 years of experience in retail, distribution, manufacturing, and consulting. He has presented at over 170 industry events to local, regional and international audiences across North America. Ford is the author of the following: APICS "Distribution Inventory Management" workshop; Accenture's "MFG 862: Scheduling Production, Projects and Operations" online course; APICS "Beyond the Basics of MRP" Webinar; and a variety of conference proceedings. He has established a reputation for delivering training that is "edu-taining."

**Jim Fox**, is the Manager of Regulatory Affairs for AVOX Systems Inc., in Lancaster, New York. Jim is the Empowered Official for AVOX Systems and is responsible for import/export compliance as well as other product regulations such as FAA and DOT relationships. AVOX Systems is a part of the Zodiac US Corporation and Jim provides guidance to other Zodiac US companies on import/export compliance. Prior to his current job, Jim was the Regulatory Analyst for AVOX Systems supporting export license preparation, import product classifications (HTS) and training. Jim has also worked for other companies in Business Development for an industrial gas company, planning and procurement for an agriculture chemical company and as a Manager of International Procurement. Jim has been working in industry for a little over ten years, the last five years focusing on import/export compliance. Jim has a BS degree in Biochemistry and an MBA from Niagara University. Jim has also recently completed the Certified US Export Compliance Officer (CUSECO) program with IIEI, and is currently an Associate Professor for IIEI teaching the CUSECO program classes.

**Gerald A. McDonald**, C.P.M., A.P.P. is a past president of ISM-Fingerlakes and currently serves as their web master. Jerry is an expert at helping individuals and affiliates use web pages for improved public relations and more efficient data management. He has done numerous presentations on websites and publications for local affiliates and ISM.

**Leslie Madigan**, has more than 25 years experience in the biotechnology/pharmaceutical industry, working for Invitrogen. Invitrogen is a California based biotechnology company that provides products and services to pharmaceutical and biotechnology companies, as well as academic and government research institutions. She currently holds the position of Technical Leader on the Global Sourcing Team supporting GIBCO™ brand products. Her primary responsibilities include global sourcing, supplier consolidation, and supply chain management. GIBCO™ brand products are used in the Life Science field, manufactured following ISO13485 standards and produced under cGMP requirements. Adherence to these strict industry standards is often the challenge when evaluating new supplier options; and working with existing suppliers. In her role, Leslie has been an integral leader in development of various policies within the supply chain organization. Some of these activities include : development of a non animal origin policy; establishing supplier scorecards; supply risk mitigation; developing, conducting and maintaining supplier surveys and supplier audits; development of supplier contracts. Prior to Leslie's current job function, she held the positions of Quality Assurance Engineer; Management of the incoming (raw material) QC lab, Purchasing Buyer/Planner. In these roles, highlights include: developing functional specifications and test methods in compliance with compendia monographs; conducting supplier audits; hosting and managing on-site customer audits; manager of Material Review Board; establishing CAPA team. Leslie has been a member of ACS; APICS and ISM., and is currently pursuing 6-SIGMA Green Belt training.

**Kathleen Perna**, has been the Executive Director of ISM-New Jersey for 15 years. She is currently a director with the ISM - NY/NJ Forum; Secretary/Treasurer for ISM Association Management Forum and member of the ISM Regional Leadership Workshop Committee.

**Gary Pezzuti**, of Summit Group has spent the past 30+ years as a Placement Professional serving most of the manufacturing sector and has observed evolutionary changes in hiring procedures as well as the emergence of numerous "magical marketing techniques". And while there are no magic pills, Gary has developed an efficient method of teaching candidates more effective 'real life' presentation techniques... satisfying the desires of the candidates as well as fulfilling the requirements of the position and the expectations of the hiring authorities. He is a frequent speaker at numerous APICS, ISM, IMA and ASQ chapter meetings across the country. He also provides Outplacement Counseling and has conducted Community Workshops, Career Planning Retreats and Regional / District Conferences including Congress For Progress; Seminar One; The 6-Packed Conference and APICS International Conferences as well as mentoring graduates of the New Jersey Food Bank Food Service Training Academy. In addition, Gary has been a member of the Northern New Jersey Chapter of APICS since 1981; serves as Treasurer for Central Jersey Chapter of APICS and Secretary for West Jersey Chapter of APICS. He is Past President of the Board of Unity Church of NYC, Treasurer of The Eric Butterworth Foundation and Adjutant for the Military Order of the Purple Heart - Chapter 202.

**Edward Riggie, III, C.P.M.** is a Senior Procurement Manager with IBM. He has 20 years experience in Supply Management as a manufacturing equipment and durable tooling buyer. He is a past President of NAPM Binghamton. Mr. Riggie won the ISM – NY/NJ 2005 Leadership Person of the Year and the ISM 2006 Leadership Person of the Year awards. He is currently the 2<sup>nd</sup> Vice Chair ISM – NY/NJ Forum.

**Gareth Thomas**, is President Group Procurement and Physical Supply chain for EMI Music. EMI is one of the world's leading music companies and represents recording artists spanning all musical tastes and genres and owns one of the finest catalogues of recorded music with over 3 million individual tracks including The Beach Boys, The Beatles to Coldplay and Katy Perry. Gareth joined EMI earlier this year, before this he was Group VP for ICI PLC Mergers and Acquisition team, before this he was responsible for the development and definition of a variety of ICI's key global sourcing strategies including those relating to raw materials, packaging, finance and accounting and HR. Gareth has also led over \$1 billion of ICI's major IT and BPO deals.

## CONFERENCE DETAILS AND INFORMATION

NEW YORK/NEW JERSEY FORUM CONFERENCE Binghamton, NY November 7-8, 2008

### Dates and Times:

Friday, November 7th and Saturday November 8th  
Conference starts at noon on Friday with a welcome session with Guy Haddix, CPSM. The conference ends at 9:00 PM on Saturday.



### Location:

Holiday Inn Arena  
2 - 8 Hawley Street  
Binghamton, NY 13901-3199  
Telephone: 607 722-1212  
<http://holidayinnbinghamton.com/>

### You are responsible for making your hotel reservations.

Please call the hotel and identify yourself as attending the ISM NY/NJ Conference for special room rate of \$89/night plus tax for single or double occupancy; \$159/night plus tax for a suite. Deadline for special room rate is Friday, October 20, 2008.

**C.P.M. points:** 12 CEU hours will be awarded

**NEW – Students can attend this conference at a reduced rate of \$200 (register by 10/20/08); \$246 (register after 10/20/08) – this rate applies to full time students only.**

**CPSM Bridge Exam will be offered on November 7, 2008.**

**Registrations are due by 10/15/08 -**

[http://www.ismnyj.org/ISM\\_Related\\_Events/ISM\\_Related\\_Events.htm](http://www.ismnyj.org/ISM_Related_Events/ISM_Related_Events.htm)

### Is your affiliate interested in sponsoring a break?

We are looking for sponsors (affiliates or member firms) for the coffee breaks. Cost of coffee, muffin break is \$5.00 per person. Afternoon break is \$5.75 per person. If interested in providing one, please contact Kathy Perna (908) 431-1100 ([info@ismnj.org](mailto:info@ismnj.org))

**Conference Dress** – Sessions casual - Friday evening networking buffet casual attire (Theme – A night at the races Charity Event – (please note alcoholic beverages will be available). Saturday evening banquet – business formal (jacket & tie).

## CONFERENCE REGISTRATION FEES

Conference registration includes all sessions, Deadline for registration is October 20, 2008

### REGISTRATION:

Early Bird Registration \$250.00 (**BY Oct. 20, 2008**)  
Student Registration \$200.00 (**BY Oct. 20, 2008**)

Conference Registration \$295.00 (**AFTER Oct 20, 2008**)  
Student Registration \$246.00 (**AFTER Oct. 20, 2008**)

On Site Registration Conference only \$295.00

### GROUP DISCOUNT

Early Bird Affiliates registering 5 or more \$225.00 registrations (By Oct 20, 2008)

### GUEST MEALS (for those not staying at the hotel)

Meal plan for the Entire Conference, (includes gratuity and applicable taxes) per person. \$75.00. No individual meals may be purchased.

You can register online at: <http://www.ism.ws/go/?page=522>



### Conference Location:

Holiday Inn Arena  
2 - 8 Hawley Street  
Binghamton, NY 13901-3199  
Telephone: 607 722-1212  
Website <http://holidayinnbinghamton.com/>

The Holiday Inn Arena & Convention Center is located in the heart of downtown Binghamton, and offers an excellent hospitality experience that will exceed your expectations. During your stay, we invite you to enjoy our Binghamton hospitality! A prime location central to major area corporations and leisure activities make the Holiday Inn Arena your best choice for accommodations in Binghamton and the southern tier of Upstate New York.

### Local Information

Golf within 3 MI / 4.83 KM

Shopping within 0.1 MI / 0.16 KM

Tennis within 2 MI / 3.22 KM

Attractions

Ross Park Zoo (2 MI / 3.22 KM )

Mets AA Baseball Stadium (1 MI / 1.61 KM )

Broome County Veteran's Arena AHL Senators Hockey (0.2 MI / 0.32 KM )

Watkins Glen Speedway (45 MI / 72.42 KM )

Many Golf Courses in the area (2 MI / 3.22 KM )

6 Area Historic Carousels (4 MI / 6.44 KM )

Fingerlakes Wine Region (40 MI / 64.37 KM )

Roberson Museum (0.5 MI / 0.8 KM )

Broome County Arena (0.5 MI / 0.8 KM )

Kopernik Space Education Center (7 MI / 11.27 KM )

Discovery Center (2 MI / 3.22 KM )

Anderson Center for the Arts at Binghamton Univ. (4 MI / 6.44 KM )

Northgate Speedway (3 MI / 4.83 KM )

Discount Outlet Shopping (3 MI / 4.83 KM )

**ISM NEW YORK NEW JERSEY 2008 ANNUAL CONFERENCE REGISTRATION FORM**

Early Registration Discount! Sign Up Now!!

Mail to: Kathy Perna, ISM NY/NJ Forum, P.O. Box 6585, Hillsborough, NJ 08844  
Phone 908-431-1100 ? Fax 908-431-1122 ? e-mail:info@ismnj.org

Name: \_\_\_\_\_ CPSM \_\_\_\_\_ C.P.M. \_\_\_\_\_ A.P.P. \_\_\_\_\_ Affiliate \_\_\_\_\_

Job Title: \_\_\_\_\_ Company/Organization \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Please indicate Track choice for each session:

Nov. 7<sup>nd</sup> Roundtable selection: \_\_\_\_\_

Nov. 8<sup>th</sup> 1A \_\_\_\_\_ 1B \_\_\_\_\_ 2A \_\_\_\_\_ 2B \_\_\_\_\_ 3A \_\_\_\_\_ 3B \_\_\_\_\_

**Fees:**

\$295 (\$250 if registered prior to Oct.20th) \$ \_\_\_\_\_  
\$246 Student (\$200 if registered prior to Oct. 20<sup>th</sup>) \$ \_\_\_\_\_  
Onsite Registration Conference only \$295

**Method of Payment:**

Check enclosed for \$ \_\_\_\_\_  
Credit Card: Type (circle) Visa Amex MC  
Expiration Date \_\_\_\_/\_\_\_\_ (month/year)

Address \_\_\_\_\_

**Group Discount**

Early Bird Affiliates Registering 5 or more \$225 each

If registered prior to Oct. 20<sup>th</sup> \$ \_\_\_\_\_

Amount to be charged \$ \_\_\_\_\_

Card Number \_\_\_\_\_

**Guest Meal Package** (for those not staying at the Hotel) Meal Plan for entire conference, (includes Gratuity and applicable taxes) per person \$75 \$ \_\_\_\_\_

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

Card Holders Signature \_\_\_\_\_

**Name of Guest:** \_\_\_\_\_



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