

PAEI/WIT-NC Joint Program

Designing Effective Supply Chain and Sales Channel Screening Programs
May 20, 2026, 2PM-8PM at Adobe Systems, San Jose, CA

Agenda

Session	Time	Topic	Speakers
Registration	1:30-2:00	N/A	N/A
Introduction	2:00-2:15	Welcome, Intro PAEI & WIT-NC, Facility Briefing, Review Agenda	Gieselle Perez (PAEI) Amber Anderson (WIT-NC) Portia Neal (Adobe)
Panel 1	2:15-3:15	<p>Designing Effective Supply Chain and Sales Channel Screening Programs – the Big Picture</p> <p>This panel will address how to conduct risk assessments, obtain resources to address those risks, and how to balance execution between in-house and outside resources. The panel will also address managing M&A related issues, such as due diligence and integration issues.</p>	Moderator: Dan Fisher-Owens (Berliner Corcoran & Rowe LLP) Laura Tomarchio (ARM) Melissa Vincelette (Google)
Panel 2	3:15-4:15	<p>Export/Sales Channel Due Diligence</p> <p>This panel will address how to balance automation and the human element in designing and implementing export / sales channel screening and due diligence programs. Topics will include selecting and implementing third-party automation solutions for restricted party screening and the challenges of automating / streamlining end-use restrictions.</p>	Moderator: Jack Zeller (Applied Materials) Jen Inman (Lumentum) Marisa Mar-Jones (Nvidia) Charlie Heidlage (Kharon)
Break	4:15-4:30	N/A	N/A

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Panel 3	4:30-5:30	<p>Import/Supply Chain Due Diligence</p> <p>This panel will address how to balance automation and the human element in designing and implanting due diligence systems focused on import and supply chain due diligence. Topics will include UFLPA/supply chain tracing, classification verification, and how companies are using automation and AI to enhance their customs compliance efforts</p>	<p>Moderator: Leslie Levy-August (KYG)</p> <p>Chris Hayes (Deloitte)</p> <p>Amber Stewart (Disney)</p> <p>Todd Smith (KYG)</p> <p>Richard Hogg (NextPower)</p>
Panel 4	5:30-6:30	<p>Operationalizing AI Solutions for Trade Compliance</p> <p>This panel will focus on addressing the how and why of implementing AI solutions, including examples of successful and unsuccessful implementation, and deciding whether to buy vs. build your own AI solutions</p>	<p>Moderator: Justin Sherlock (Caspian)</p> <p>John McPeak (Karl Stortz)</p> <p>Angela Aaron (Klearnow)</p>
Dinner Service / Networking	6:30-7:00	N/A	N/A
Dinner Speaker	7:00-7:45	Experience and reflections on third-party automation solutions and AI, from an in-house and outside consulting perspective	<p>Matt Bell (Tradecompliance.software)</p> <p>(Remote)</p>
Wrap	7:45-7:50	Wrap-up	<p>Gieselle Perez (PAEI)</p> <p>Amber Anderson (WIT-NC)</p>