



31st Annual Executive Seminar Series on International Trade

Massachusetts Small Business Development Center Network Massachusetts Export Center

presents



Fall 2021

Partners for Trade

Seminar and Registration Guide

In Collaboration With

U.S. Small Business Administration | MA Office of Business Development
Isenberg School of Management | University of Massachusetts Amherst
MassDevelopment | Massachusetts Office of International Trade & Investment
U.S. Department of Commerce

All events held
virtually



Charles D. Baker, Jr.
Massachusetts Governor

*The Massachusetts Export
Center is committed to helping
the state's businesses succeed
in today's global marketplace.*

*The world is your market.
Take the next step.
Join us as a partner for trade.*



Robert H. Nelson
SBA District Director

Register online at www.mass.gov/export



reregistration is required for all events. **Payment** via credit card is due at the time of registration.

Cancellation/Refund Policy: If you cancel your registration at least 48 hours prior to the event, you will be entitled to a refund minus a \$10 processing fee. No refund will be given on notifications received after that time or in any no-show situation. All cancellation and refund requests must be submitted via email to pft@msbdc.umass.edu. The Export Center reserves the right to cancel or reschedule a seminar due to insufficient enrollment or other circumstances. In the case of cancellation, registration fees will be refunded.

No Shows: Due to the costs we incur as a result of people who register for seminars and do not attend, the Massachusetts Export Center will bill unpaid registrants for the full cost of the event unless cancelled 48 hours in advance of the event. Credit cards will not be refunded in any no-show situation.



UMassAmherst

Isenberg School
of Management



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PARTNERS FOR TRADE CALENDAR

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Until further notice, all training is offered virtually.

Although accurate at press time, webinars may be added, rescheduled or cancelled.

*For the most up-to-date information, please visit our website at **www.mass.gov/export**.*

Program Descriptions

Financing Export Sales: Resources for Massachusetts Businesses

Striking the right balance between risk mitigation and ease of doing business is a challenge that faces many exporters, especially when working with unfamiliar customers located in unfamiliar places. How do you protect your business against export credit risk and nonpayment while adapting to the factors surrounding each transaction? How can you best work with your buyer to offer credit terms that will benefit you and enable them to pay your business? Fortunately, tools are available for businesses to finance export sales and protect against nonpayment that can meet the unique needs of sellers and buyers.

Please join us as we hear from the U.S. Small Business Administration and the Export-Import Bank of the U.S. to learn about grants and loan programs for export sales; tools for extending credit to foreign buyers; and export credit insurance resources that can protect against foreign buyer nonpayment.

Speakers include:

- Richard Foy, Regional Director, Eastern Region — Export-Import Bank of the United States
- Joseph Raycraft, Export Finance Manager — U.S. Small Business Administration

Date: Friday, September 17, 2021

Time: 12:00 - 1:00 p.m. EST

Cost: No charge



2021 Major Changes to the Export Administration Regulations

A few major changes to the Export Administration Regulations (EAR) took place in 2021. As of March 29, the U.S. Department of Commerce Bureau of Industry and Security (BIS) has implemented significant modifications to EAR that relax requirements on the classification and reporting of mass-market encryption items and on email notifications previously required for publicly-available encryption source code and beta test software. The new rule also implements revisions that impact 22 dual-use technologies found on the Commerce Control List, generally narrowing the scope of the controls or providing clarification on the existing entries.



Also in March, BIS introduced a new Military Intelligence End User (MIEU) Rule, which prohibits unauthorized exports and related support activities for MIEUs in certain countries, regardless of export control classification. Join us for this webinar that will review these and other changes, including the impact on reporting and licensing requirements, even in cases where an export does not take place. The webinar will also provide guidance on compliance and due diligence in this complex environment.

Speakers:

- Melissa Mannino, Partner — BakerHostetle
- Ragan Updegraff, Associate — BakerHostetler

Date: Thursday, September 30, 2021

Time: 12:00 - 1:00 p.m. EST

Cost: \$25 / no charge for Compliance Alliance members

Export Credit Risk Mitigation

As an exporter, you want to make your export transaction as risk-free as possible. From a payment perspective, this means cash in advance, placing all risk on your buyer. But what if your buyer isn't able to pay in advance? Will you turn away orders from these customers? What about customers

in countries with political or economic insecurities? Would you turn down a large sale because you were concerned about exchange rate fluctuations or foreign government policy changes?



With 96% of the world's consumers located outside of the United States, you can't afford to place unnecessary restrictions on your company's global growth potential! There are tools to help. Don't miss this opportunity to learn about growing your business and maintaining a competitive edge by offering terms that work for you and your foreign buyers. Additionally, you will learn about managing credit risk and currency volatility in the current global economic climate.

Join us to hear from international finance experts who will discuss methods of international payment and tools to mitigate credit and foreign exchange risk, including letters of credit, documentary collections and other trade finance solutions.

Speakers include:

- June Daigle, Vice President, International Banking — Eastern Bank
- Charles Smith, Senior Vice President — Eastern Bank

Date: Friday, October 8, 2021

Time: 12:00 - 1:00 p.m. EST

Cost: No charge

Export Control Update

Compliance with federal export controls is a challenging obligation for most U.S. exporters, with complex regulations administered by a variety of government agencies, each with their own rules for compliance. The regulations themselves are only part of the puzzle, however. The ability to read and navigate the regulatory environment can be key to staying ahead of the curve on changes and implementing effective practices that can keep pace.

Join us to hear the latest on the export regulatory environment, including trends, areas of caution, and tips for compliance. We will discuss current compliance topics and factors influencing the export regulatory environment, including: the pending Ensuring American Global Leadership and Engagement (EAGLE) Act and its anticipated influence on export control policy; implications of Biden Administration appointments for key export control posts; restricted party trends; export licensing policy and more, with a focus on top issues facing U.S. exporters on a day-to-day basis.

Our speaker will be Douglas Jacobson, Founding Partner with Jacobson Burton Kelley PLLC.

Date: Wednesday, October 20, 2021

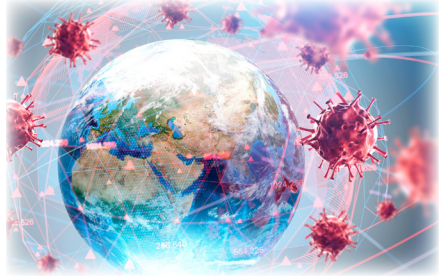
Time: 12:00 - 1:00 p.m. EST

Cost: \$25 / no charge for Compliance Alliance members



Global Business Development in a Pandemic

Developing and executing a successful international business development strategy has never been easy, but the global pandemic has challenged us in ways that we never thought possible. Throughout the pandemic, many exporters have had to completely reimagine their global business development efforts, often shifting to digital marketing channels and making due with Zoom instead of traveling to maintain relationships with global partners. And, just as international travel and traditional global business development venues have begun to re-open, they can and will shut down on a dime due to pandemic surges.



Join us to learn about the fundamentals of export market assessment, global strategy development, and sales channel management, with an emphasis on how the pandemic has impacted global business development activities. Our expert speakers will provide you with tips for keeping your international business development efforts both nimble and relevant, with an eye towards global marketing in a post-pandemic world.

Our speakers will be:

- John Cullen, General Manager, Latin America & Global Licensing — New Balance
- William Tung, General Manager, Asia-Pacific — Clarks

Date: Thursday, October 28, 2021

Time: 12:00 - 1:30 p.m. EST

Cost: No charge

Tariff Management: How to Manage Costs in the Current International Trade Climate

With recent, dramatic escalations in U.S. and global tariffs, as well as other trade restrictions, it has become increasingly important to manage costs while keeping up with the latest regulatory and policy changes. Tariff management involves a systematic approach to taking advantage of all opportunities provided by Customs laws and regulations to reduce your total duty burden while remaining compliant with such laws and regulations. An effective tariff management program allows your company to profit by reducing costs of doing business in a fiercely competitive global economy.

This webinar, which will focus on tariff management, is targeted at importers and exporters that are looking to reduce or defer tariffs through mechanisms such as duty drawback, tariff engineering, country of origin optimization, valuation strategy, and the use of bonded warehouses and foreign trade zones.

Our speaker will be Matthew Bock, Managing Partner with Middleton, Shrull & Bock LLC.

Date: Wednesday, November 3, 2021

Time: 12:00 - 1:00 p.m. EST

Cost: \$25 / no charge for Compliance Alliance members



Managing Cross-Border Risks and Costs Exporting to Canada

While Canada is our nation's largest export market, it is also a surprisingly challenging market when it comes to customs clearance, cost containment and taxes. Moreover, the U.S. Canada Mexico (USMCA) trade agreement and recent updates to Canadian tax laws have created even more change, and, in some cases, increased costs, for U.S. exporters.

This webinar will review the USMCA and related issues for U.S. exporters, including rules of origin, documentary requirements, and related developments, such as new de minimis thresholds. The webinar will also discuss related issues, such as Canada's Customs clearance process and non-resident importer program. The webinar will also discuss related tax issues, including updated Goods and Services Tax (GST) collection rules and withholding tax for services performed in Canada. Our expert speakers will provide you with guidelines for compliance while managing costs and risks.

Our speakers will be:

- Peter Kirby, Partner — Fasken Martineau DuMoulin LLP
- Speaker TBA — Fasken Martineau DuMoulin LLP

Date: Friday, November 19, 2021

Time: 12:00 - 1:30 p.m. EST

Cost: \$25 / no charge for Compliance Alliance members



Best Practices for Using the Consolidated Screening List

Screening is undoubtedly the biggest universal compliance challenge for exporters, regardless of what is being exported or where it is being exported to. Many companies find it worthwhile to invest in a screening automation solution. The majority of exporters, however, do not have the volume of shipments to justify the expense of a compliance automation system. The Consolidated Screening List (CSL) consolidates several screening lists published by federal regulatory authorities, including the Departments of Commerce, State and Treasury. And while the CSL lacks the speed and automation of many screening subscription services, it is a perfectly acceptable, convenient and free solution for many exporters. Lack of automation means a higher risk for human error, however, and companies using the CSL must carefully implement procedures for compliance.



This webinar will review steps for managing export screening using the Consolidated Screening List. The webinar will discuss screening risk assessment, development of screening protocols, and the elements of the CSL, including guidelines for compliance and implications for licensing. The webinar will also walk through the CSL itself and provide tips for search procedures and recordkeeping. Join us to learn how to use the CSL confidently and effectively!

Speakers include:

- Kathleen Kinahan-Newell, Trade Compliance Manager – Massachusetts Export Center
- Paula Murphy, Director – Massachusetts Export Center

Date: Thursday, December 9, 2021

Time: 12:00 - 1:00 p.m. EST

Cost: No charge

Export Expo

Join us for the Export Expo – the state’s largest and most important export event of the year that brings together resources, training and information for the local exporting community!



The Massachusetts Export Center’s Export Expo provides a forum for exporters to connect with the wide range of export resources available in Massachusetts while learning about issues that impact their day-to-day operations.

This year’s Export Expo will again be a virtual event that will include an exhibit area featuring government, non-profit and private sector service providers serving the export community. The Export Expo will also feature a lineup of workshops, panel discussions and special addresses on a wide variety of export-related topics.

The Export Expo will feature influential guest speakers and opportunities to connect with experts to answer your specific export questions. We hope that you will join us for the same timely and important international trade content in a convenient and safe virtual format! Our virtual platform will provide opportunities for networking and allow participants to view all of the conference’s content, so you won’t miss a thing!

Speakers and content to be announced soon.

Exhibitor and sponsorship opportunities are available! Contact Paula Murphy at paula.murphy@massexport.org for further information.

Dates: Thursday and Friday, January 27 and 28, 2022

Time: 10:00 a.m. - 4:00 p.m. EST

Cost: No charge

www.mass.gov/export/expo



The Compliance Alliance is a special initiative of the Massachusetts Export Center designed to help the state's businesses enhance their export compliance and global trade competitiveness.

The Compliance Alliance provides a forum for exporting firms to network, share best practices and stay current on export regulatory compliance issues.

Membership benefits include:

Conferences and seminars - In-depth training across a broad range of export regulatory compliance and operational issues. Speakers include exporters, law firms, consulting firms and representatives from government export regulatory authorities. Compliance Alliance members receive special discounts at compliance-related conferences and training programs.

Online Resources - Member directory access so you can connect with other members of the Compliance Alliance; Export compliance resource library and databank that includes content provided by members; and a Job Board where members can access and post job listings for local positions related to international regulatory compliance, export/import operations and other positions related to global trade.

www.mass.gov/export/compliance

Partners and Cosponsors

The **Massachusetts Export Center** (www.mass.gov/export), part of the Massachusetts Small



Business Development Center Network, recognizes the need to make export services easily accessible to companies of all sizes, and it serves as the state's one-stop resource for export assistance.

The Massachusetts Export Center offers a wide range of targeted, customized services to Massachusetts businesses at any stage in the export process. Whether you are a small business just thinking about exporting or an experienced exporter, the Massachusetts Export Center stands ready to help with services suited to your needs. Massachusetts companies can learn more about the Massachusetts Export Center by visiting our website.

The **Massachusetts Small Business Development Center Network** (www.msdbc.org),



through the **Massachusetts Export Center**, offers small to medium sized Massachusetts companies business advice on assessing export opportunities, market research analysis and educational programs through the *Partners for Trade* executive seminar series. Assistance includes counseling on the elements of an international business plan, assisting in the development of

an international marketing strategy, providing market research reports and trade leads, publishing various export guides and organizing a variety of export training programs. International trade advising services are available statewide.



The **Massachusetts Office of Business Development** works with the business community to help create, retain and attract jobs throughout the Commonwealth by offering programs that stimulate economic growth and development. The office is committed to working directly with the business community to make Massachusetts an even better place to do business.

MassDevelopment provides financial tools and real estate expertise to stimulate economic growth across the state of Massachusetts by providing real estate development and financial services through its four core lines of business: Real Estate Development, Investment Banking, Economic Development Lending and Community Development. The agency's lines of business are designed to support a project at any stage — from concept to development.

The **Massachusetts Office of International Trade & Investment** carries out the following international economic activities: attracting foreign companies to invest in Massachusetts; handling foreign protocol; and focused export promotion through international trade show participation.

The **U.S. Export Assistance Center** offers a full range of federal export programs and services under one roof, including counseling, market research, trade contact facilitation, international trade promotion events, and trade finance through the Export Working Capital Loan Guarantee Program. The U.S. Export Assistance Center combines the export marketing resources of the **U.S. Department of Commerce** and the export finance resources of the U.S. Small Business Administration.

The **U.S. Small Business Administration** is dedicated to providing quality, customer-oriented, full-service programs and accurate, timely information to the entrepreneurial community. SBA offers a number of export information assistance programs such as counseling, marketing research, publications and workshops. SBA also offers financial assistance through the regular business loan and the Export Working Capital Program.

MSBDC Network



The Massachusetts Small Business Development Center (MSBDC) Network provides free, high quality, one-to-one management and technical business advice and educational programs at a reasonable cost to potential and existing small business entrepreneurs throughout the Commonwealth.

The MSBDC has three integrated product lines: business advisory services, international trade assistance and government contracting/SBIR.

Successful entrepreneurs continually seek ways to improve the management and operation of their business, often seeking outside advice to help with particular challenges. Studies consistently show that Massachusetts citizens receive a strong return on their investment by utilizing the services of the MSBDC Network. MSBDC clients outperform other businesses in the state in average sales and job growth.

The MSBDC is a partnership of the U.S. Small Business Administration, the Massachusetts Office of Business Development, and a consortium of higher educational institutions led by the Isenberg School of Management at the University of Massachusetts Amherst, and including Clark University and Salem State University.

State Office413-545-6301

Business Advising Centers

- Berkshire Regional Office413-499-0933
- Central Regional Office508-793-7615
- Government Sales Advisory Program508-870-3193
- Massachusetts Export Center 617-973-6610
- Northeast Regional Office978-542-6343
- Procurement Technical Assistance Center413-545-6303
- SBIR Program774-203-9972
- Southeast Regional Office508-673-9783
- Western Regional Office413-577-1768

Visit our website at www.msbdc.org

The Massachusetts Export Center has moved!

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The Massachusetts Export Center offers a wide range of targeted, customized services to Massachusetts businesses at any stage in the export process. Whether you are a small business just thinking about exporting or an experienced exporter, the Massachusetts Export Center stands ready to help with services suited to your needs.

For further information, visit our website at **www.mass.gov/export**.



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