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FROM TARIFFS AND CHAOS TO CONTROL



LEO GIL

Vice President of Product, Bottomline

CRAIG JEFFERY

Founder & Managing Partner, Strategic Treasurer



WHAT

Discussing the results from the Tariffs & Treasury Survey and what treasurers and CFOs should be doing to improve cash visibility and risk management in uncertain times.



WHEN

Thursday, March 27, 2025
11:00 AM - 12:00 PM EDT



WHERE

Live online presentation
Replays at StrategicTreasurer.com



Certified Corporate
Financial Planning &
Analysis Professional



This presentation is provided by Strategic Treasurer and Bottomline.

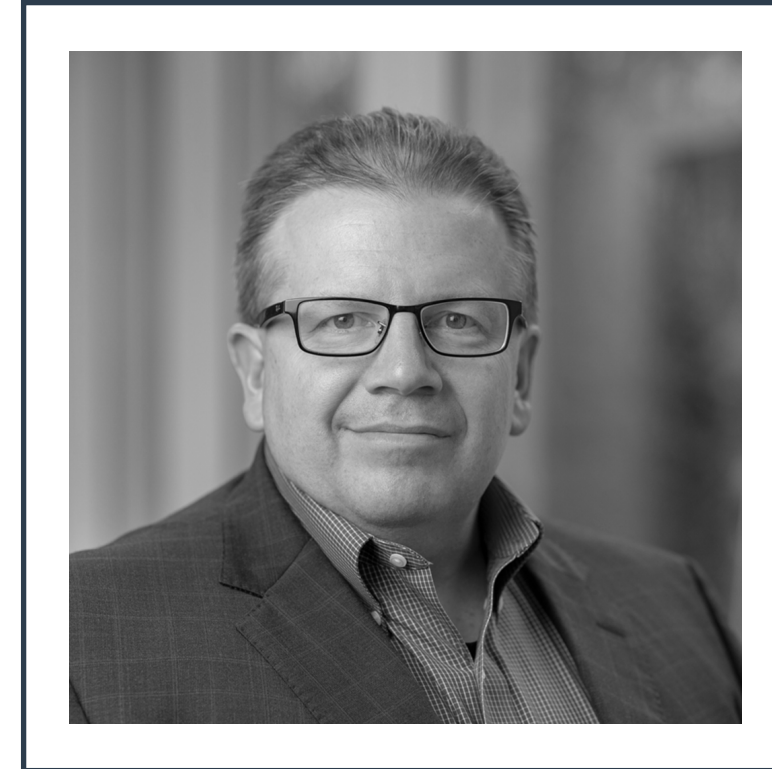
ABOUT THE SPEAKERS

GET TO KNOW TODAY'S SUBJECT MATTER EXPERTS



LEO GIL

Leo Gil leads the Cash Management and Payments product at Bottomline, working closely with corporate clients around the globe to develop innovations that help them achieve greater control and visibility over their cash and become more efficient. He has more than 20 years of experience in the software industry, leading product and development teams primarily focused on financial technology services.



CRAIG JEFFERY

Craig Jeffery formed Strategic Treasurer in 2004 to provide corporate, educational, and government entities direct access to comprehensive and current assistance with their treasury and financial process needs.

His 30+ years of financial and treasury experience as a practitioner and as a consultant have uniquely qualified him to help organizations craft realistic goals and achieve significant benefits quickly.

TOPICS OF DISCUSSION

KEY AREAS OF FOCUS &
ANALYSIS



ABOUT THE SURVEY
KEY POINTS OF INTEREST



LATEST NEWS
ON TARIFFS



TARIFF IMPACTS
ORGANIZATIONAL EFFECTS



RISK MITIGATION
INVESTMENT RESPONSE



TARIFF PREPARATION
ACTIONS TAKEN




KEY TAKEAWAYS
FROM THE RESEARCH

SURVEY QUICK STATS

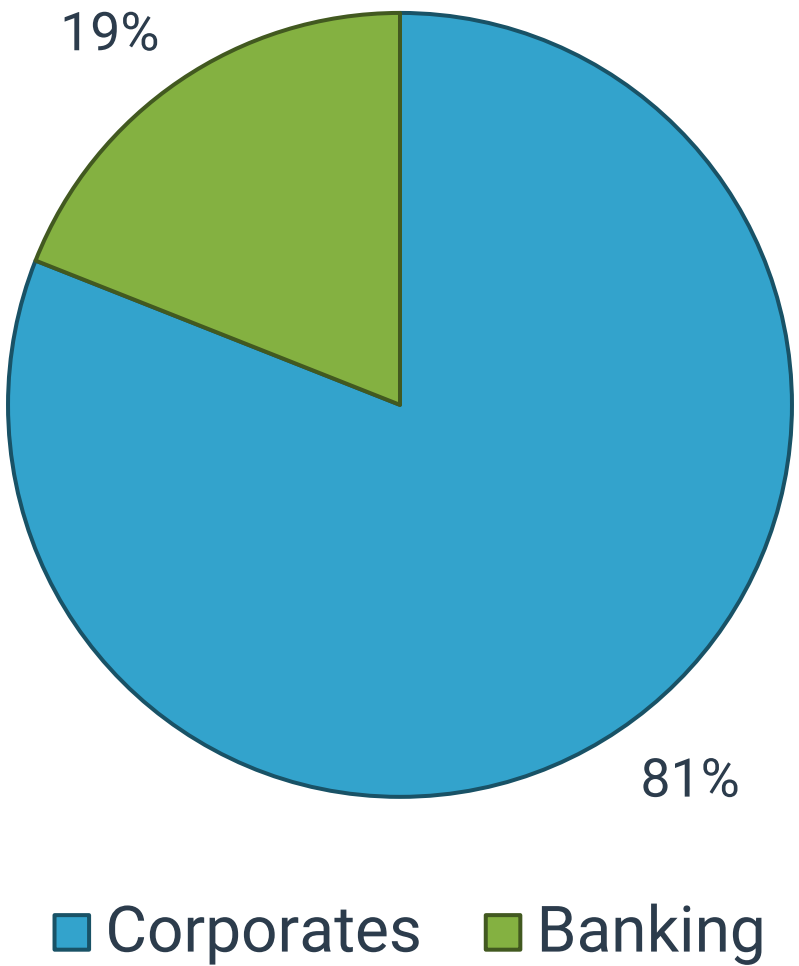
TARIFFS AND TREASURY FLASH SURVEY

 **~100**
Respondents

 **10-day**
Survey Runtime

 **10**
Questions

Organization's industry



NEWS ON TARIFFS

RAPIDLY CHANGING



Worldwide:

- 25% US tariff on imports of steel and aluminum from all countries, effective March 12
- On March 26, US signaled 25% tariff on imported vehicles

European Union:

- Counter-tariffs on \$28 billion in US goods beginning in April, including 50% tariff on American whiskey
- US responded with threat of 200% tariff on European alcoholic beverages

Canada and Mexico:

- Effective March 4, 25% US comprehensive tariffs on Canada and Mexico, with reduced 10% tariff specifically on energy resources from Canada
- On March 6, US stated it would pause tariffs on goods and services compliant with United States-Mexico-Canada Agreement (USMCA) until April 2
- Canada responded to steel and aluminum tariffs with new duties on \$20 billion in US goods

China:

- Effective March 4, US increased tariffs from 10% to 20%
- China responded with up to 15% tariffs on US farm goods, effective March 10

Venezuela:

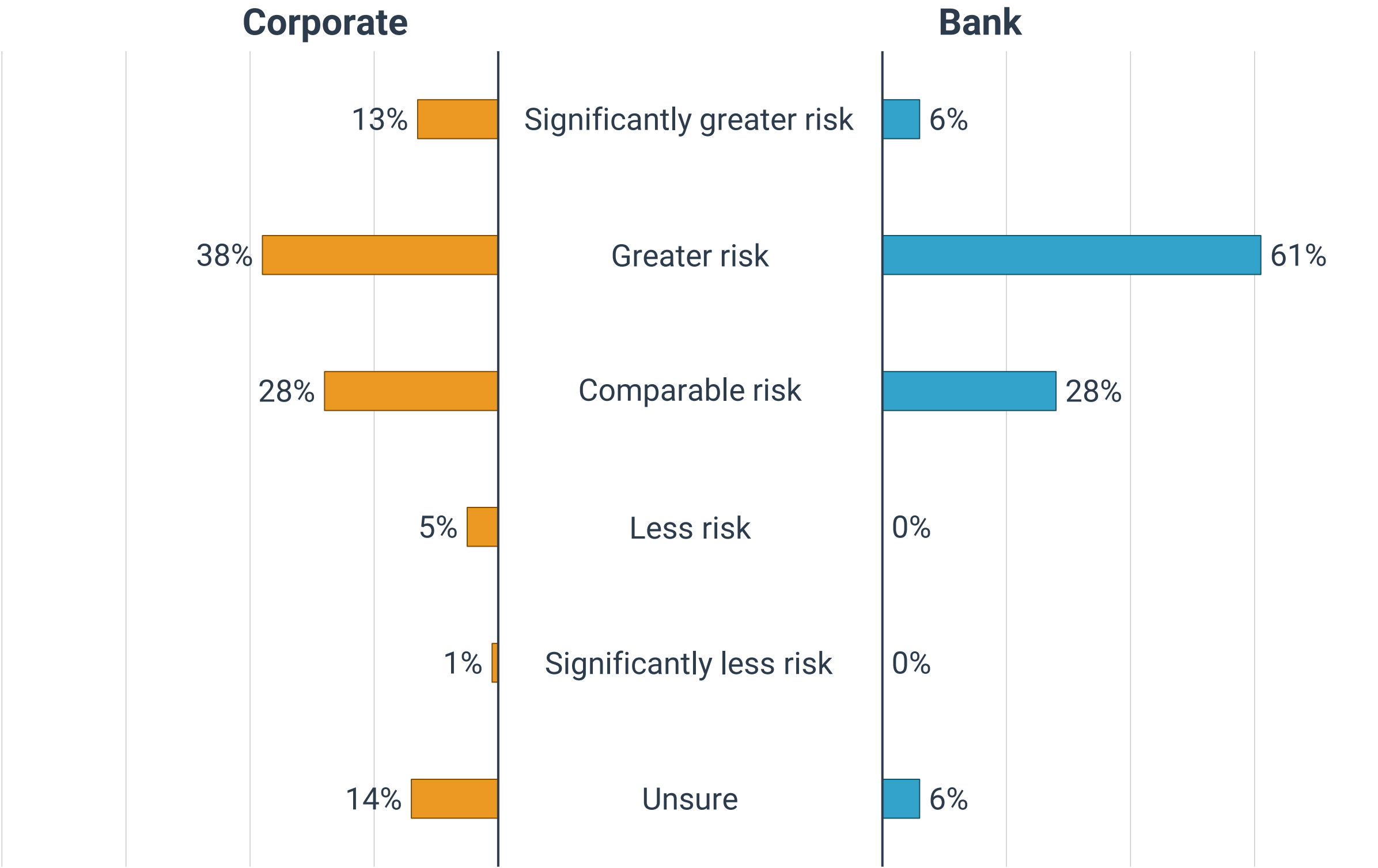
- On March 24, US announced 25% “secondary tariff” on all goods from countries that import Venezuelan oil or gas, effective April 2

ECONOMIC OUTLOOK

BANKS MORE NEGATIVE THAN CORPORATES

» How do you anticipate that current and potential tariffs will impact your company's overall economic outlook in 24 months?

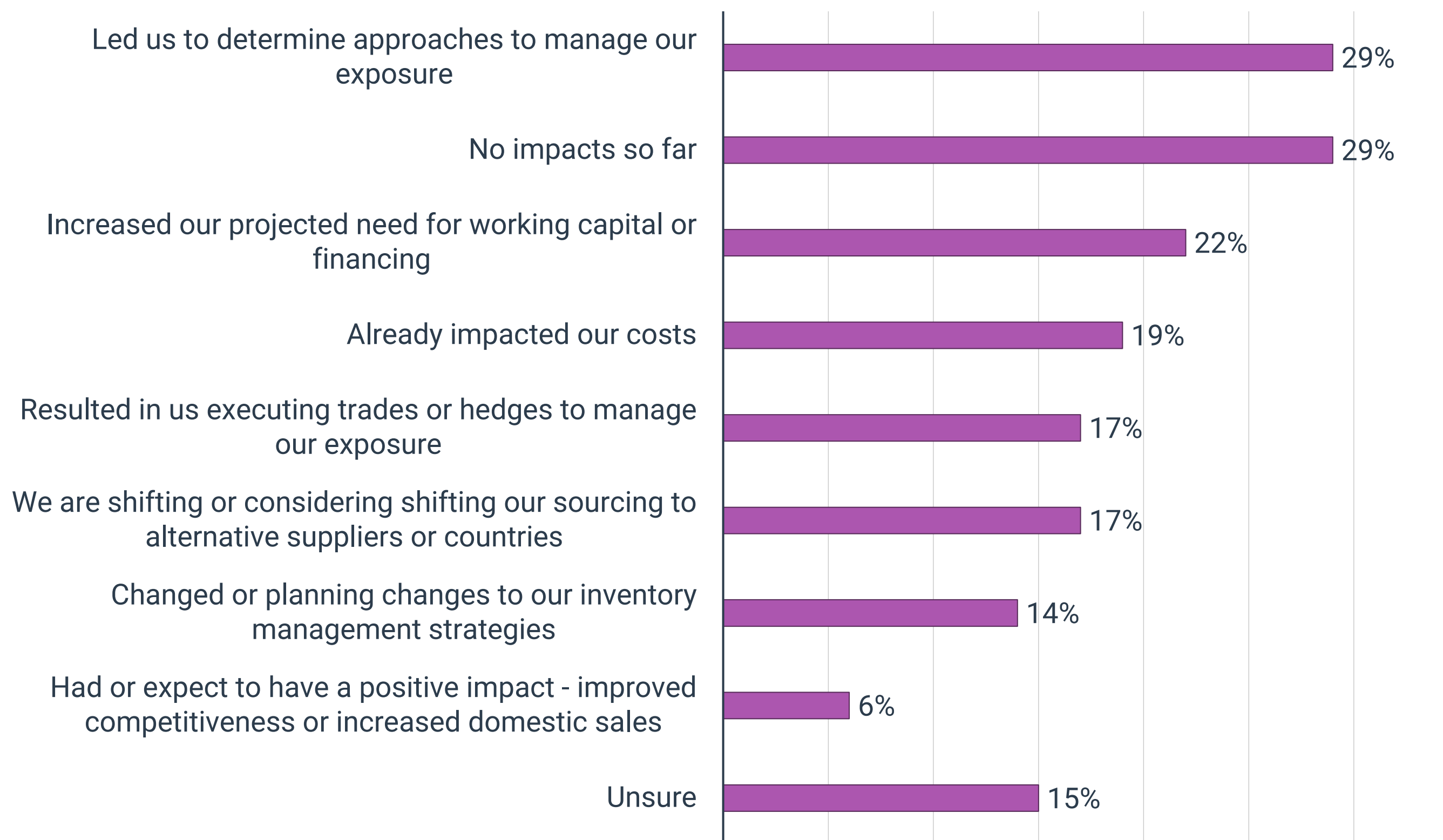
» Overall, how do you anticipate that current and potential tariffs will impact your client's overall economic outlook in 24 months?



INFLUENCES FROM TARIFFS

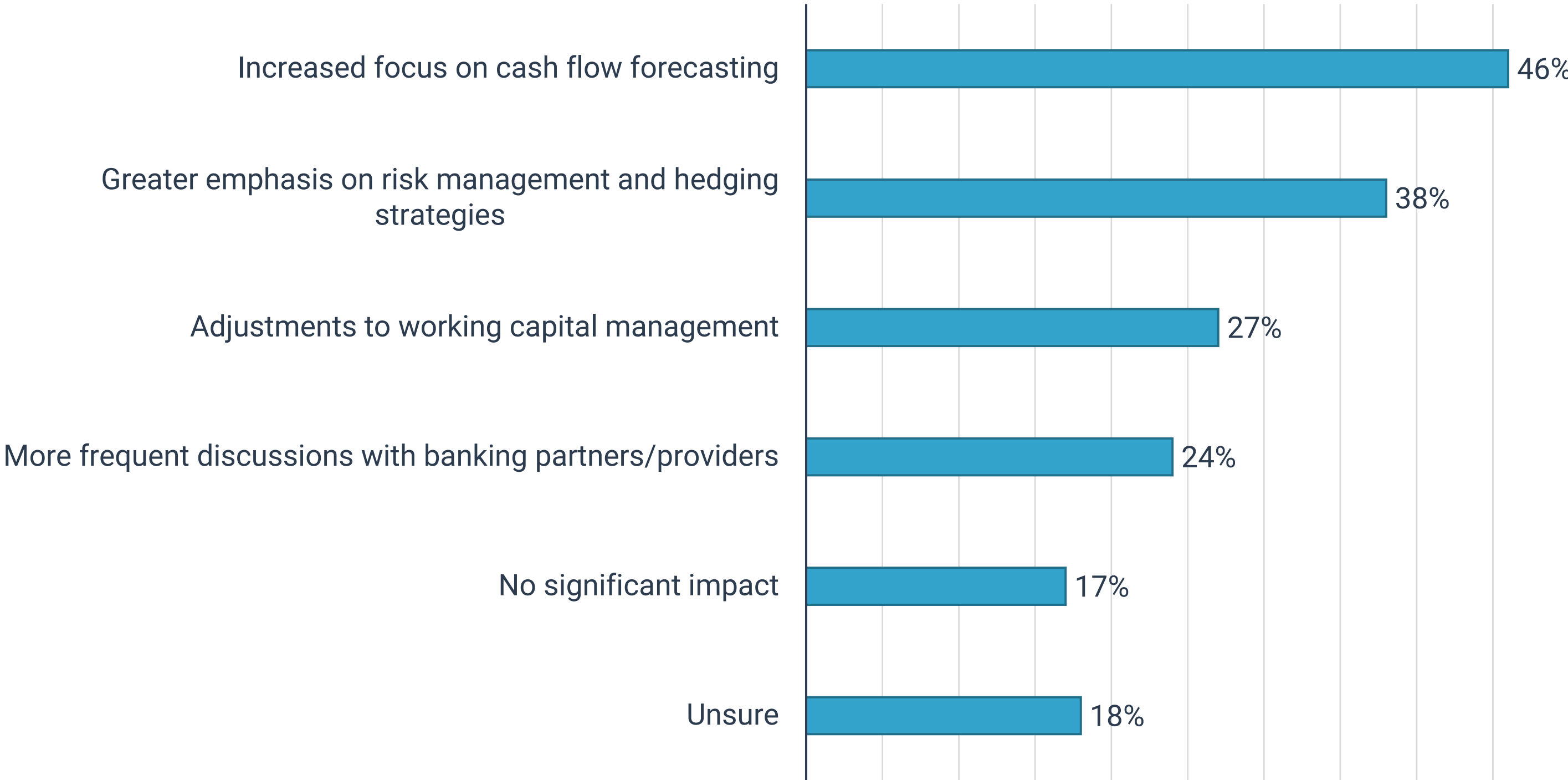
MAJORITY ARE EXPERIENCING IMPACTS

» Have the tariffs and potential tariffs had any of the following impacts on your organization so far? (Select all that apply)



POLL QUESTION

Poll 1 - How has recent economic uncertainty (e.g., tariffs, interest rate changes) impacted your company's treasury priorities? (all that apply)



MITIGATING RISK

HALF OF COMPANIES EXPECTED TO INCREASE INVESTMENTS

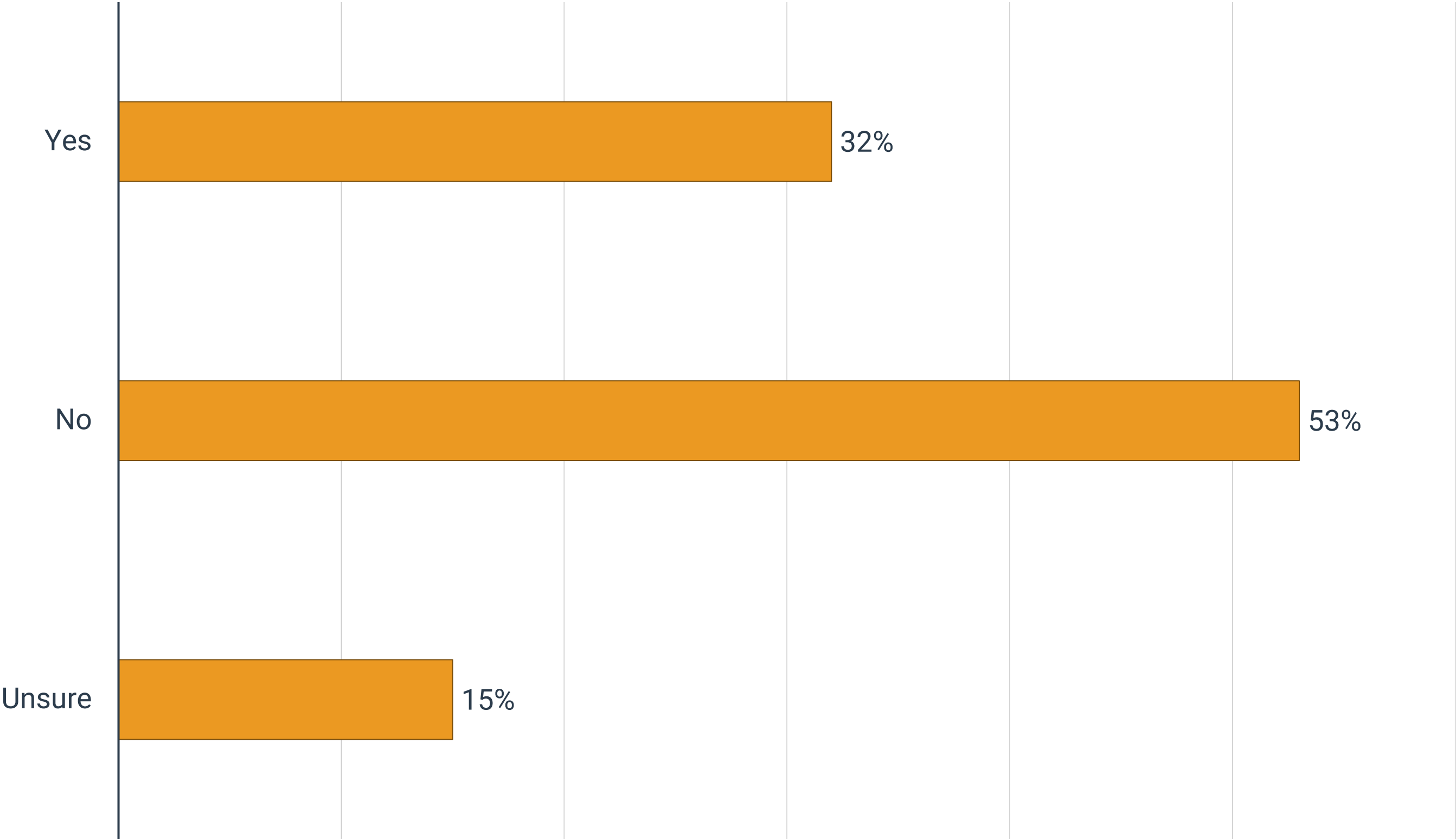
» *In which areas is it likely that your company will increase its investment in response to an elevated perception of risks? (Select all that apply)*



DISCUSSIONS WITH BANKS

ON ORGANIZATIONAL IMPACT OF TARIFFS

» *In the last three months, have you had a conversation with your bank(s) on the impact of tariffs on your company or industry?*

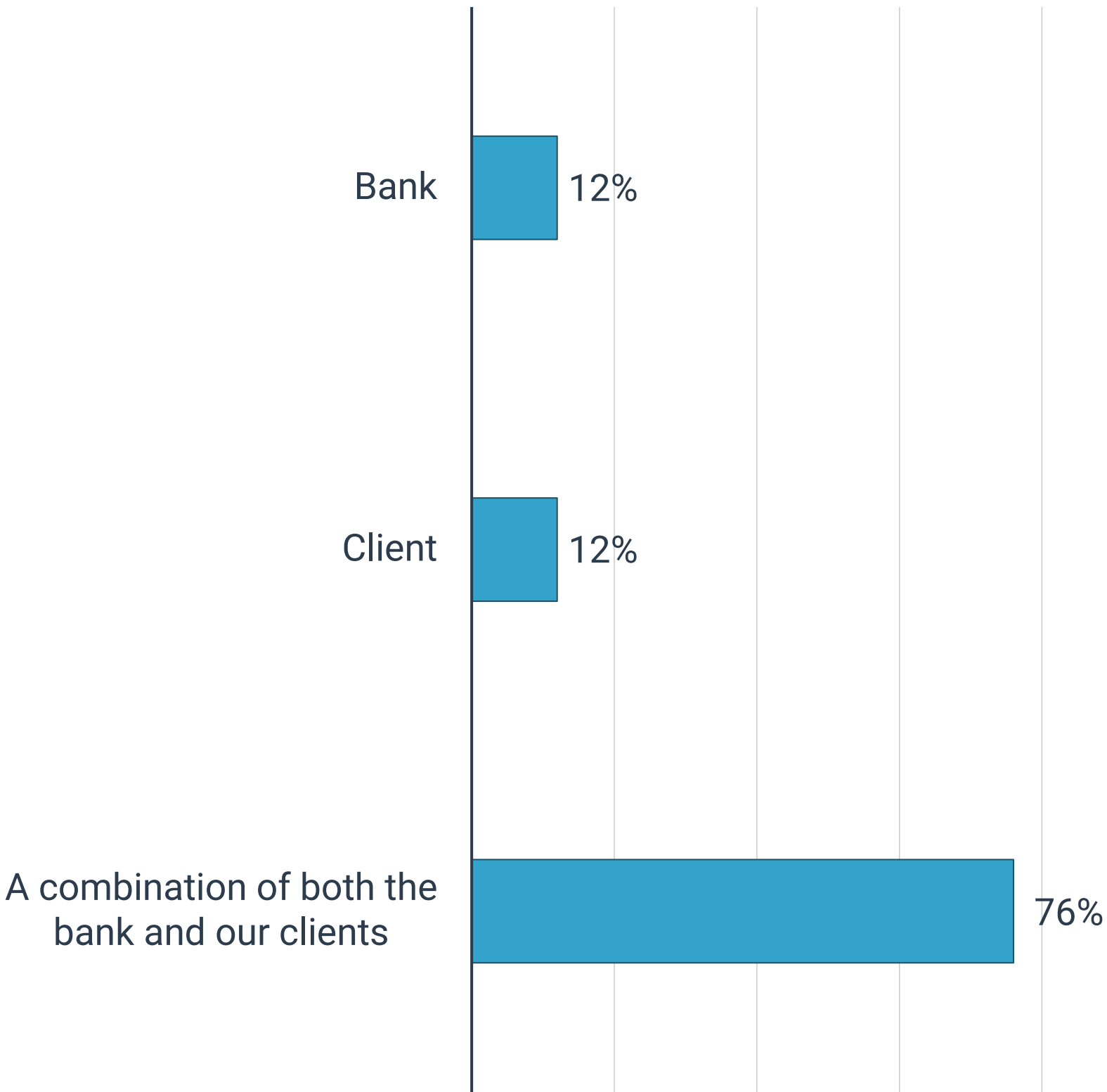
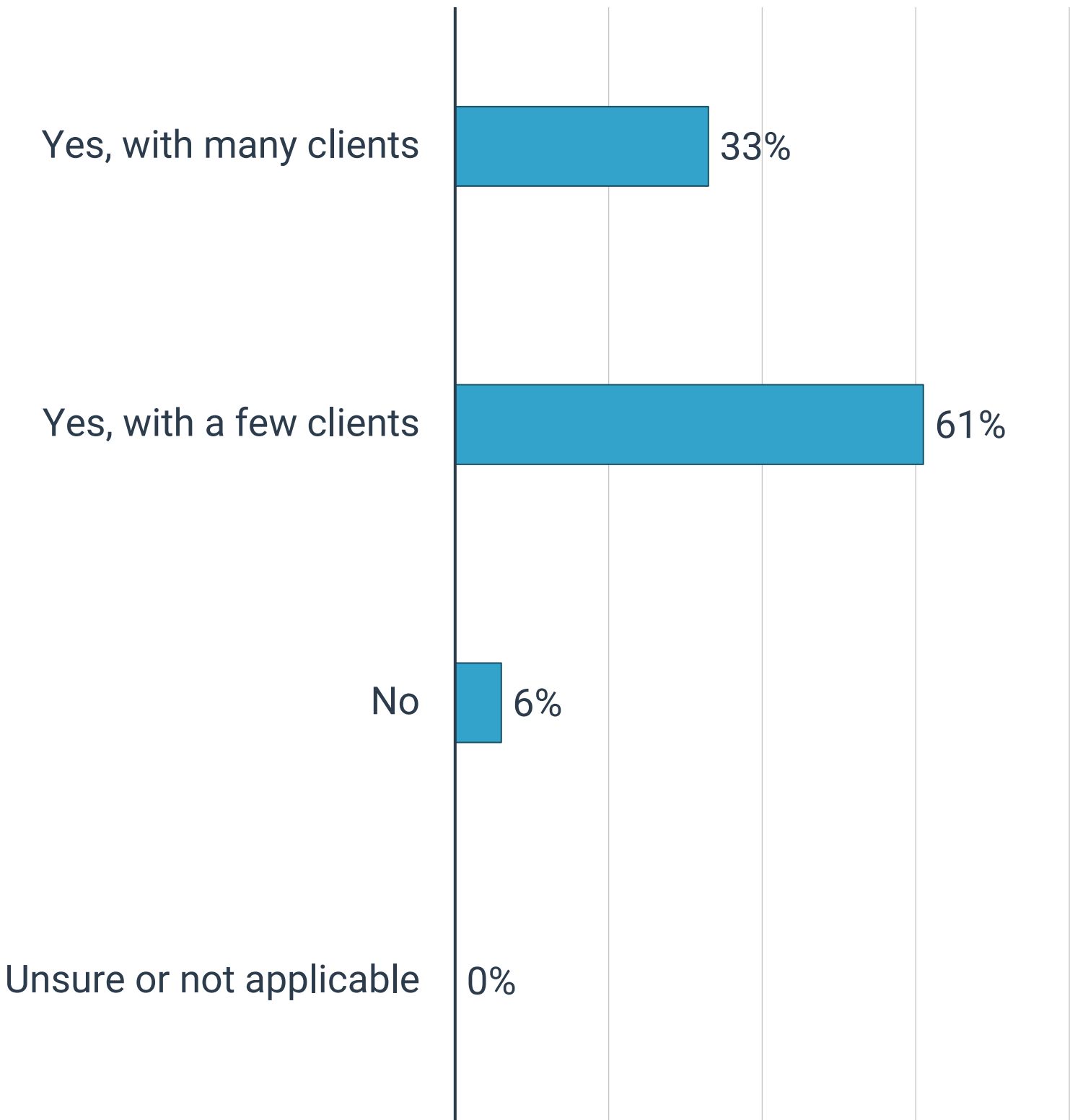


DISCUSSIONS WITH CLIENTS

CONVERSATIONS ON EFFECTS OF TARIFFS

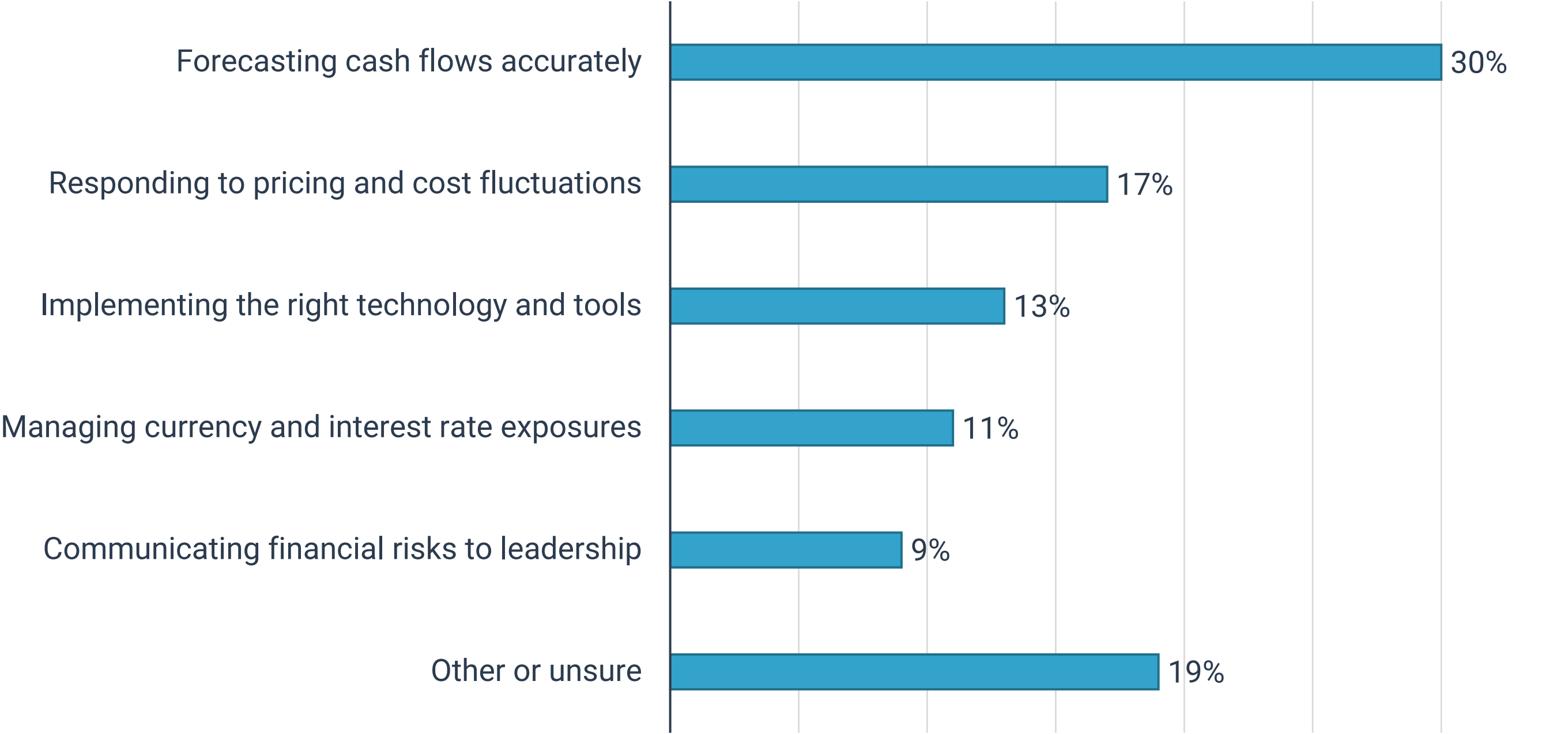
» *In the last three months, have you had conversations with your clients on the impacts of tariffs on them or their industry?*

» *Who initiated these conversations?*



POLL QUESTION

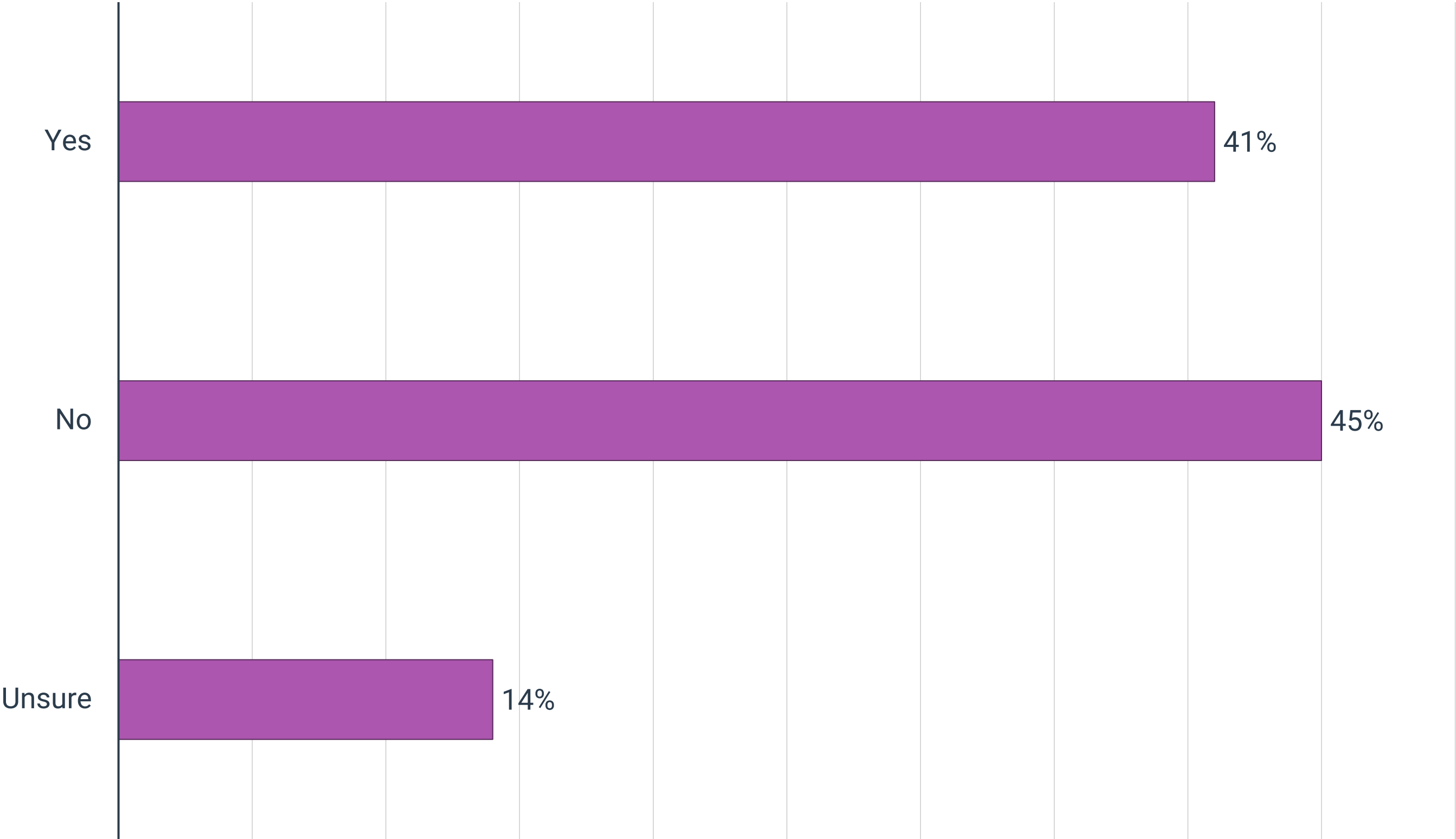
Poll 2 - Which aspect of treasury management has been the most challenging for your organization in the current volatile environment?



MANAGERIAL REQUESTS

WANTING MORE INFORMATION

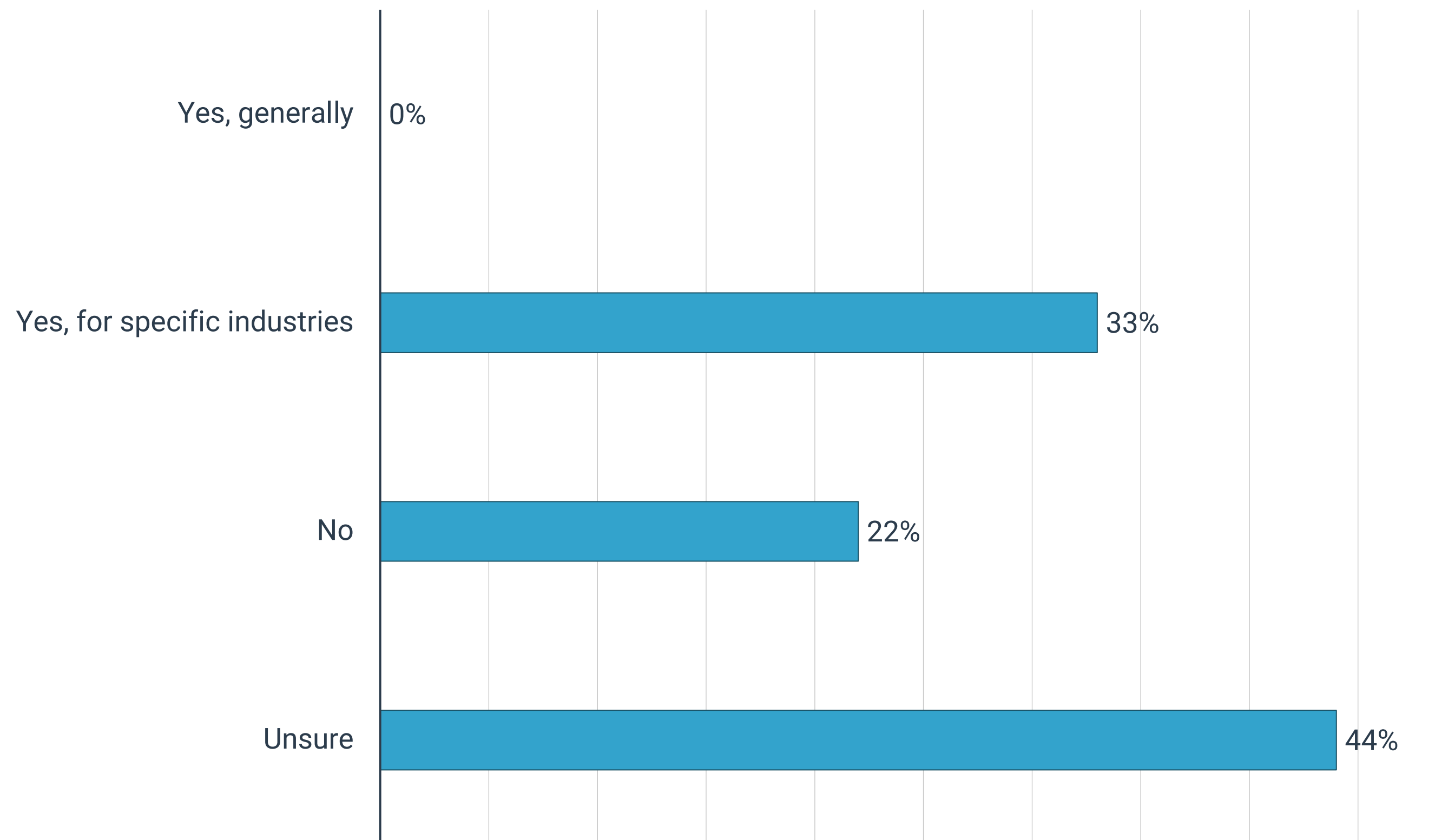
» *In the last three months, has management (treasury or corporate) asked for additional information on the potential impact of tariffs?*



CREDIT AVAILABILITY FROM BANKS

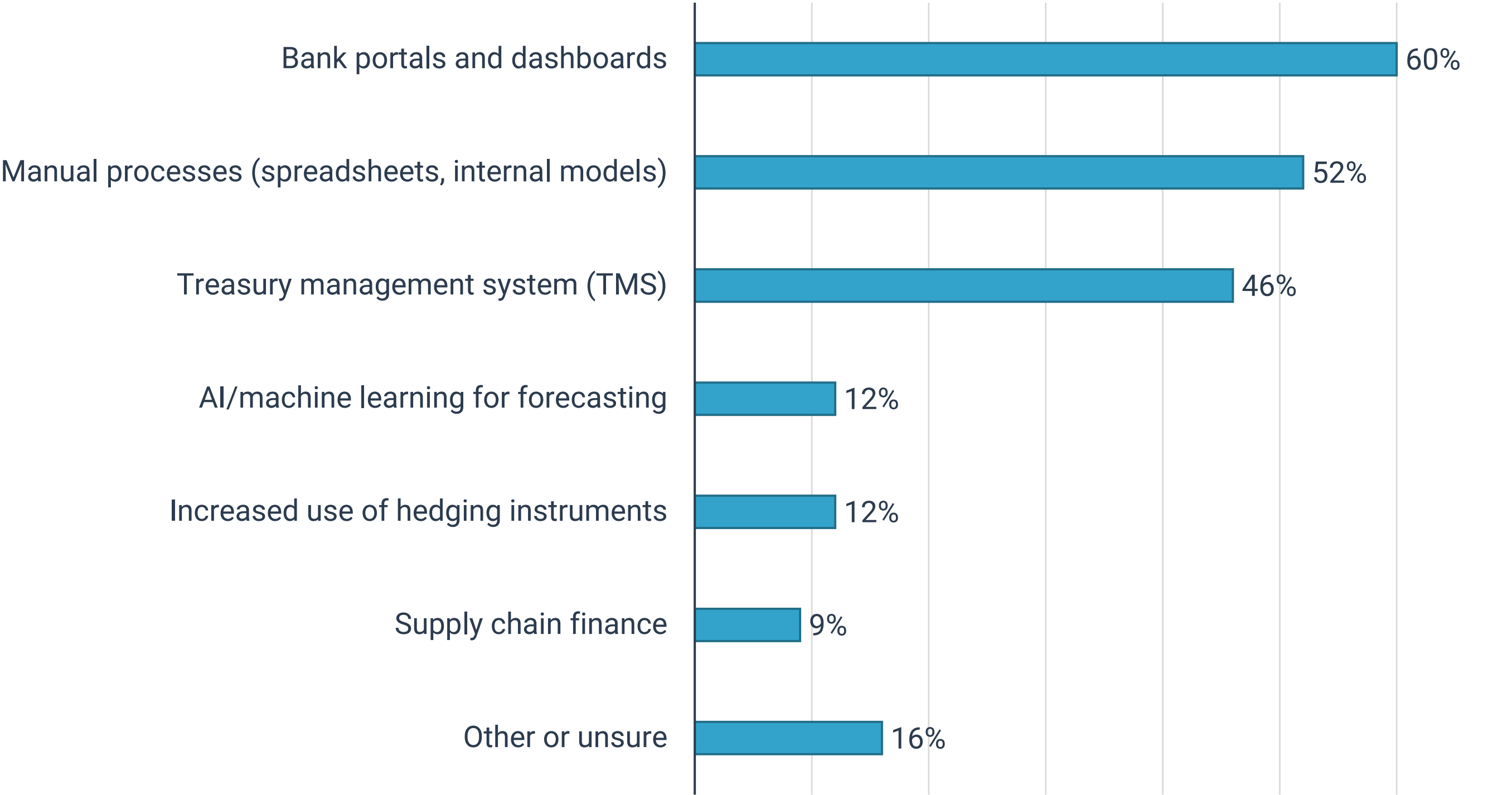
CHANGES INFLUENCED BY TARIFFS

» *Has your bank implemented or considered implementing any changes in credit availability due to tariffs?*



POLL QUESTION

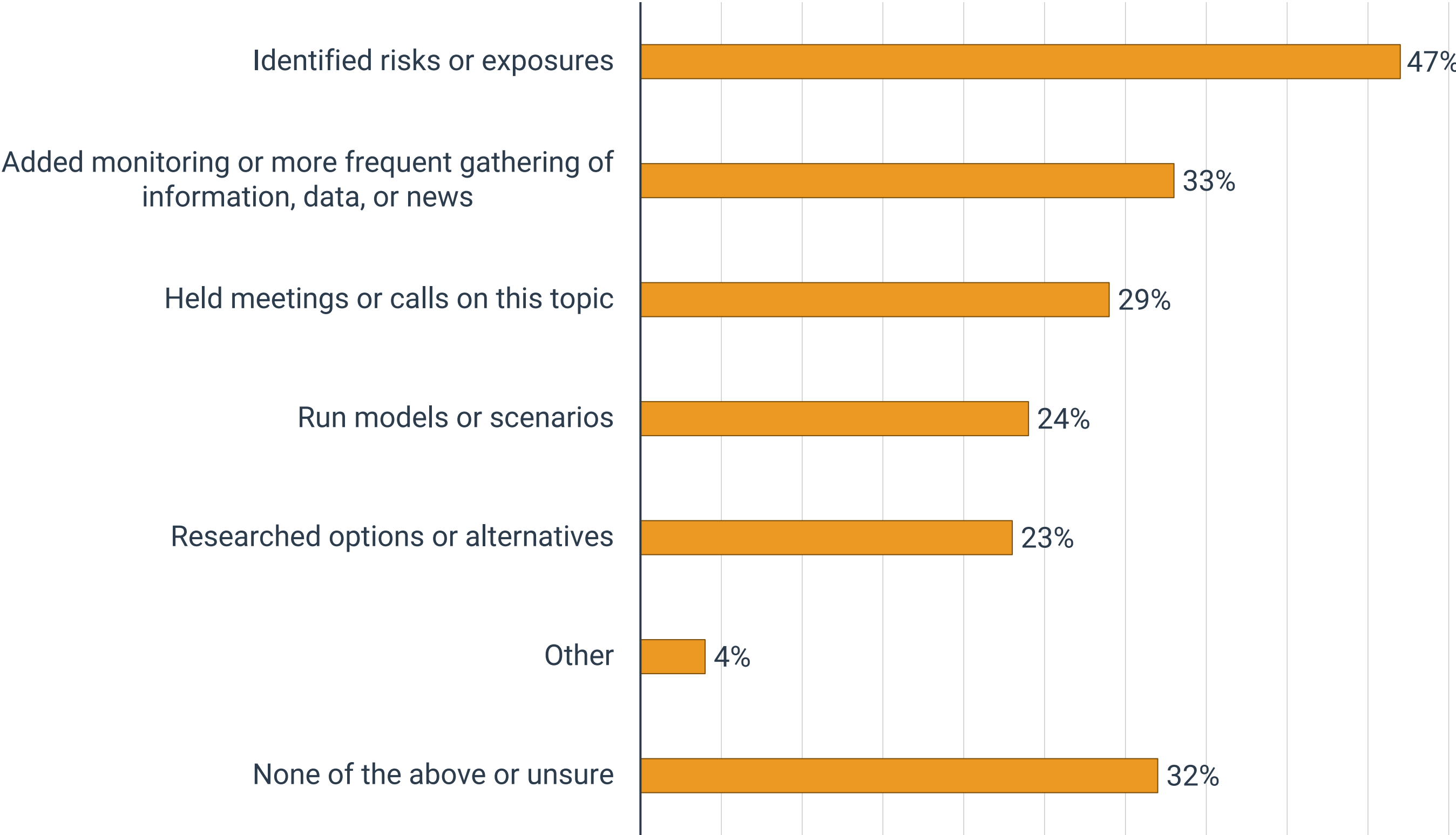
Poll 3 - What tools or strategies are you currently using to improve visibility and control over cash and risk? (all that apply)



PREPARING FOR TARIFFS

MEASURES TAKEN

» What has your organization done in preparation for tariffs and the potential impact on your organization? (Select all that apply)



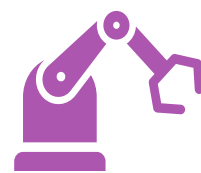
FINAL THOUGHTS

HOW TO PROCEED



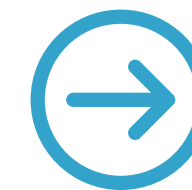
MANAGING CASH FLOW

- Lean more on supply chain finance?
- Rely on letters of credit?
- Find new suppliers?
- Forecasting matters



AUTOMATION

- Organizations are looking at tech to manage risk
- Combine technology, data, and expertise for maximum effectiveness



BE PROACTIVE

- You don't have to wait for management to take initiative to guard against risk

LET’S CONNECT

DON’T LET THE LEARNING END HERE...
CONTACT US WITH ANY FUTURE QUESTIONS

Thank you for your interest in this presentation and for allowing us to support you in your professional development. Strategic Treasurer and our partners believe in the value of continued education and are committed to providing quality resources that keep you well informed.



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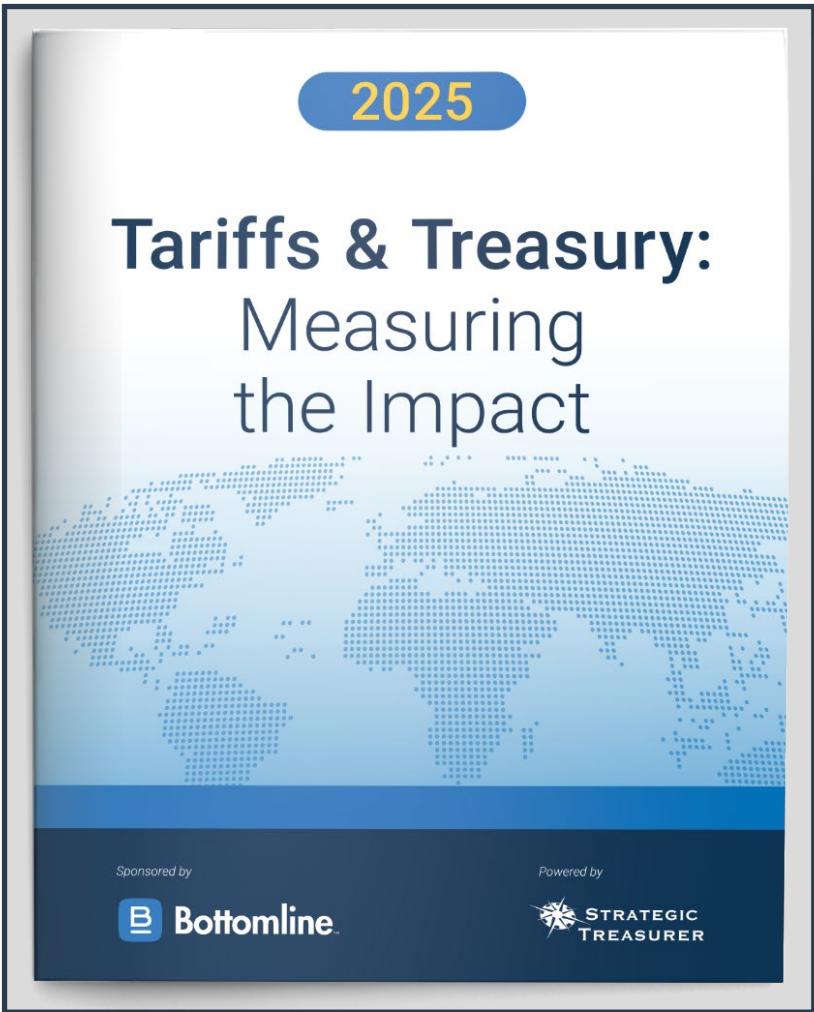


BOTTOMLINE

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TARIFFS & TREASURY SURVEY REPORT

Thanks to those who completed the survey!

 [Download Report](#)

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- Treasury Structures
- Liquidity & Risk
- Banking Services
- Treasury Technology



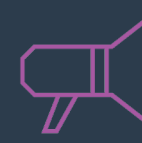
ASSIST Outsourced Services

- Fee Management
- Employee Security Training
- Compliance Services
- Connectivity & Onboarding



RESEARCH Market Data

- Survey Participation
- Research Report Access
- Industry & Peer Benchmarking
- Critical Treasury Assessment



INFORM Industry Insights

- Technology Analyst Report
- Webinars (CE Credits)
- Podcasts & Videos
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- Investment Validation



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- SME Speaker Bureau



RESEARCH Market Data

- Treasury Insights (Data Services)
- Tailored Market Research
- Survey Program Sponsorship
- Client Benchmark Reporting



INFORM Industry Insights

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