

BANKING ON THE FUTURE

September 18-20, 2024
Ocean Casino Resort, Atlantic City

AGENDA

Wednesday, September 18th

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| 3:00 pm – 4:30 pm | Board of Directors Meeting |
| 5:00 pm – 7:00 pm | Welcome Party |
| 7:00 pm | Dinner on Your Own |

Thursday, September 19th

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| 8:00 am – 8:30 am | Breakfast |
| 8:30 am – 8:35 am | Welcome |
| 8:35 am – 9:25 am | Economic Outlook
<i>Dudley Carter, Senior Economist, Market Strategist, Stifel</i> |

Gain new insights into the current state of the economy and what it means going forward for overall growth, interest rates and monetary policy. Explore macro-economic trends in consumer spending and investment, new monetary and fiscal policy initiatives, and the potential economic effects of these changes.

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| 9:25 am – 10:15 am | Interest Rates and the Rate Environment
<i>Maurine Boateng, Financial Services Internal Audit Manager, Crowe</i>
<i>Matt Suhovsky, Financial Services Risk Senior Manager, Crowe</i> |
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Explore nominal vs. real interest rates, understand the factors influencing interest rates, and the impact different sectors are having on the current rate environment.

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| 10:15 am – 10:25 am | Networking Break |
| 10:25 am – 11:15 am | Deposits: Asset Management & Trends in Banking |
| 11:15 am – 12:00 pm | How Can Your Bank Prepare for AI? |

Panelists: *John Kowal, SVP, Managing Principal - Chief Technology Officer, Peapack-Gladstone Bank*
Edward Heraux, Founder & President, The Lytic Group
Peter Seok, Senior Manager, Data Analytics, EY

Data experts in banking reflect on the important data questions to ask your leaders, employees and IT team. Discover the significant data-related factors influencing your bank's readiness to jump on board the AI train.

12:00 pm – 12:10 pm

Warren Hill Award

Recipients: *Suellen Arcchi*, SVP, BSA & Deposit Compliance Officer, Manasquan Bank
Nancy Schneier, Founder and Chief Revenue Officer, Vikar Technologies, Inc.

12:10 pm – 12:30 pm

Break for Lunch/Working Lunch

12:30 pm – 1:20 pm

Leveraging Data Analytics to Drive Marketing Results

David Waldron, President, White Whale Solutions

Learn how to leverage data analytics to unlock valuable insights that help optimize deposit strategies, acquire new customers, enhance onboarding processes, build strong customer relationships, and improve retention.

1:20 pm – 2:10 pm

Combating Synthetic Fraud: Strategies for Banks and Customer Education

Luisa Franco, CEO, Founding Partner, LFP Risk Solutions

Learn how to recognize the signs of synthetic fraud, implement effective detection and prevention strategies, and educate customers about safeguarding their financial information. Attendees will explore real-world case studies and best practices to gain new tools to protect your institution and customers.

2:10 pm – 3:00 pm

Recent Developments under the Community Reinvestment Act

Michael Mancusi, Esq., Partner, Arnold & Porter
Kara Ramsey, Esq., Associate, Arnold & Porter

Discuss the developments in, and the litigation over, the CRA Modernization Rule. Understand the recent CRA-related rulings and initiatives of the agencies, along with examination developments and trends of the most recent examinations.

3:00 pm

Afternoon at Leisure

5:00 pm – 6:00 pm

Networking Reception

6:00 pm

Dinner on Your Own

Friday, September 20th

8:00 am – 8:30 am

Breakfast

8:30 am – 9:15 am

How to Attract the Next Generation of Leaders to the Banking Industry

Vikrant Raj, Managing Director - Risk Advisory, Grant Thornton Advisors LLC

With the rise of the millennial and Gen-Z workforce, companies are seeking new ways to attract and retain top talent. Learn new strategies to retain top talent and avoid putting your bank at risk.

9:15 am – 10:00 am

Effective Leadership

Donald Musso, President & CEO, FinPro Inc.

In an environment of ever-changing generations, it is crucial to lead effectively as people are the most important element of banking. Discover the necessary traits you need to be an effective leader, and learn how to further enhance your leadership skills.

10:00 am – 10:30 am

Succession Planning

Pressures driving executive leadership turnover include aging of senior leadership, industry changes, the call for more diverse leadership, and consolidation. Gain new insights into what Boards and executive leadership must do to ensure your bank's future success with effective succession planning.

10:30 am

Conference Concludes