

# AI in Banking Conference

Thursday, October 30, 2025 ■ 9:00 am - 2:00 pm ■ The Park Avenue Club, Florham Park, NJ

## AGENDA

3 CPE, 1 CLE, 3 CERP, 3 CRCM, 1 CAFP & 1 CFMP Credits Apply

**9:00 am – 9:30 am**

**Registration and Breakfast**

**9:30 am – 9:35 am**

**Welcome**

**Emcee:** *William Nowik*, Principal & Chief Information Security Officer, Wolf & Company

**9:35 am – 10:25 am**

**How to Approach AI at Your Bank: A Practical Playbook for Leaders**

*Edward Vincent*, CFA, CEO, Lumio (Formerly SRA Watchtower)

*Discover a practical, risk-aware roadmap for institutions looking to responsibly adopt AI without compromising trust, compliance, or data integrity. Drawing from real-world examples, attendees will learn key phases of AI implementation: from choosing the right low-risk use cases to building internal policies, frameworks and governance structures that ensure safe deployment.*

**10:25 am – 11:15 am**

**Getting Started with AI: The Banker Experience**

*Sharif Alexandre*, EVP, Chief Data & Development Officer, ConnectOne Bank  
*John Kowal*, SVP, Chief Technology Officer, Peapack Private Bank & Trust  
*Ashley Navin*, VP, Director of Data & Engineering, OceanFirst Bank

*A panel of seasoned bankers will share their AI journeys including how their banks approached AI, and the challenges they faced along the way.*

**11:15 am – 11:25 am**

**Networking Break**

**11:25 am – 12:15 pm**

**The Evolving Face of Fraud: How Banks Can Stay Ahead**

*Chris Gill*, Market Strategist, FIS

*Explore evolving trends in financial fraud and the steps institutions need to take to effectively prevent, detect and resolve fraud. Learn how to safeguard your institution from fraud and enhance your fraud management capabilities.*

**12:15 pm – 1:05 pm**

**Leveraging AI for Financial Innovation: Creating Personalized Customer Experiences with AI Agents**

*Alec Crawford*, Co-Founder & CEO, Artificial Intelligence Risk, Inc.

*Understand the transformative potential of AI agents in revolutionizing customer interactions in banking and learn how financial institutions can harness AI to deliver personalized customer experiences, thereby enhancing customer satisfaction and loyalty.*

**1:05 pm – 2:00 pm**

**Networking Lunch**