

Agenda

Annual Community Banking Conference

DAY 1 Monday, September 25	
Time	Session
8:00 a.m.–9:00 a.m.	Registration and continental breakfast
9:00 a.m.–9:10 a.m.	Welcome and opening remarks
9:10 a.m.–10:40 a.m.	<p>Virtually Loyal: The Secret to Creating Loyal Relationships in a Digital World As more of our lives move online, our relationships go with them. We'll explain how it's possible to build loyal relationships virtually using the same fundamental techniques that we employ in our personal, face-to-face interactions <i>James Kane, Loyalist</i></p>
10:40 a.m.–10:50 a.m.	Break
10:50 a.m.–12:00 p.m.	<p>A Regulatory Update We review hot topics in the current regulatory environment and their impact on community banks. <i>Caren Hill, Accounting Policy Advisor, OCC, John Rieger, Deputy Chief Accountant, FDIC, and Tullus Miller, Partner, Moss Adams</i></p>
12:00 p.m.–1:00 p.m.	Lunch
1:00 p.m.–1:50 p.m.	<p>Accounting and Auditing Update Get a brief overview of the latest updates impacting your institution and what you need to be aware of. <i>Rebecca Radell and Chris Hughes, Senior Managers, Moss Adams</i></p>
1:50 p.m.–2:00 p.m.	Break
2:00 p.m.–3:30 p.m.	<p>CECL: Don't Panic – Prepare We will discuss the latest news on CECL, implementation challenges, including those around data and modeling, and cover any identifiable industry trends to date, as well as address any questions. We'll also provide an update on transition resource group activities. <i>Regan Camp, Managing Director, MST Advisory Services, and John Donohue, Partner, Moss Adams</i></p>
3:30 p.m.–3:45 p.m.	Break
3:45 p.m.–5:00 p.m.	<p>The New Trump Economics: Can It Create Jobs and Double Growth? An overview of the economy and markets from an economist's perspective. <i>Chris Rupkey, Managing Director Chief Financial Economist at Bank of Tokyo-Mitsubishi UFJ</i></p>
5:30 p.m.	Cocktail Reception and Dinner

Annual Community Banking Conference (cont.)

DAY 2 Tuesday, September 26			
Time	Session		
7:00 a.m.–8:00 a.m.	Continental Breakfast		
8:00 a.m.–8:50 a.m.	Threats and Opportunities: Partnering with Fintech Companies Learn what banks are doing to partner with fintechs, what's driving technological change in financial services, and how this might impact people working in compliance and risk management. <i>Naomi Snyder, Editor, Bank Director</i>		
8:50 a.m.–9:00 a.m.	Break		
9:00 a.m.–9:50 a.m.	Purpose, Passion and Profits Learn how to shift your thinking from ROI to ROR—return on relationships—and focus on what will differentiate you from your competition, motivate your employees, and align you with your customers. <i>Joe Sullivan, CEO, Market Insights, Inc.</i>		
9:50 a.m.–10:00 a.m.	Break		
10:00 a.m.–10:50 a.m.	Improving Profitability No Matter What Rates Do: Living Process Improvement We'll discuss best practices for implementing and sustaining a highly effective strategy to make deliberate process improvement a habit. <i>Rob Johnson, Executive Vice President/Principal, c. myers corporation</i>	Augmenting the Retail Deposit Franchise in Today's Environment We'll review trends in nonmaturity deposit valuation, segmenting retail from commercial and wholesale funding strategies, a historical perspective of retail franchise expansion, surge balances in today's rate environment, and best practices in protecting and growing nonmaturity balances through incentive alignment. <i>Kevin Kirksey, Principal, ALM First</i>	Trends in Regulatory Compliance Learn about new regulations and proposals affecting financial institutions. <i>Debbi Burrows, Senior Manager, Moss Adams</i>
10:50 a.m.–11:00 a.m.	Break		

Annual Community Banking Conference (cont.)

<p>11:00 a.m.–12:00 p.m.</p>	<p>Compensation Trends & Best Practices Today and Looking Ahead to the Future Learn how compensation has changed in recent years and what banks are doing to align pay and performance. We'll also look at the regulatory environment and shareholder expectations that impact these trends and compensation decisions. <i>Gayle Appelbaum, Partner, McLagan</i></p>	<p>Accounting for Business Combinations This session provides an in-depth explanation of select topics for accounting for business combinations with an overview of basic principles and advanced topics. <i>John Donohue, Partner, and Anthony Porter, Senior Manager, Moss Adams</i></p>	<p>Tax Update Stay current on the important tax updates community banks need to be aware of. <i>Kristine Hoeflin, Partner, and Amy Jessup, Senior Manager, Moss Adams</i></p>
<p>12:00 p.m.–1:00 p.m.</p>	<p>Lunch</p>		
<p>1:00 p.m.–1:50 p.m.</p>	<p>Let the Good Times Roll: Analyzing the Important Performance, Capital Markets and M&A Trends in Community Banking Right now, it's good to be a banker. Since the election, bank stocks are up more than 20%, interest rates are rising, and growth continues. We'll take an in-depth review of the key financial, valuation, capital markets, and M&A trends in community banking. <i>Peter Buck and Adam Keefer, Managing Directors, Sandler O'Neill + Partners LP</i></p>		
<p>1:50 p.m.–2:00 p.m.</p>	<p>Break</p>		
<p>2:00 p.m.–3:00 p.m.</p>	<p>Cybersecurity and Technology Update <i>We'll review current trends and challenges facing institutions as they work toward managing and securing their data.</i> <i>Craig Sanders, Partner, Moss Adams</i></p>		
<p>3:00 p.m.</p>	<p>End of conference</p>		