

ANNUAL CONFERENCE & DIRECTORS FORUM

May 13 – 16, 2025
at La Quinta Resort & Club
La Quinta, CA



Agenda At-a-Glance Sponsored by:



Agenda At-a-Glance

Tuesday, May 13, 2025

7:00 AM • Dunes Course

Golf Tournament

Shotgun Start at 8:00 AM

11:00 AM – 4:15 PM • Flores Foyer

Registration Open

1:00 PM – 2:15 PM • Flores Ballroom

Kickoff Mixer in The Exchange

**Open Bar – Beer & Wine*

2:15 PM – 2:25 PM • Fiesta 1-8

Conference Welcome and Opening Remarks

Kevin Gould, President & CEO, California Bankers Association

2:25 PM – 3:25 PM • Fiesta 1-8

Opening Keynote

Game Plan for Success

Joe Theismann, Former Star Quarterback, Emmy Award-Winning NFL Analyst, Entrepreneur & Author, "How to Be A Champion Everyday"

3:25 PM – 3:30 PM • Fiesta 1-8

General Session

Vendor Showcase & Golf Tournament Winners Announcement



3:30 PM – 4:00 PM • Fiesta 1-8

General Session

Legislative Update

Jason Lane, *SVP, Director of Government Relations, California Bankers Association*
Kevin Gould, *President & CEO, California Bankers Association*

4:05 PM – 4:50 PM • BREAKOUT SESSIONS

Breakout Session #1 • Fiesta 1-8

Strategies for Franchise Value Growth and Liquidity Management Today

Max Damm, *Managing Director, IntraFi*

Breakout Session #2 • Fiesta 10

Digital First Banking Panel

Ravi Kumar, *SVP & Head of Digital Bank, CIT Bank*

David Schiff, *Senior Managing Director, FTI Consulting*

Steve Schwimmer, *EVP, CIO, Banc of California*

Mitch Siegel, *Partner, EY*

Directors Track • Fiesta 13-14

Talent and Succession: The Relationship Between the C-Suite & Board of Directors

Michele Gil, *Managing Partner, Chrisman & Company*

Brandon Biegenzahn, *President, McDermott + Bull*

5:00 PM – 6:15 PM • Hotel Waterfall

Welcome Reception

Cocktails & Crooners

Attire: Business Casual / Resort Wear

Wednesday, May 14, 2025

7:30 AM – 3:30 PM • Flores Ballroom

Registration Open (Located in *The Exchange*)

7:30 AM – 2:40 PM • Flores Ballroom

The Exchange Open

7:30 AM – 8:30 AM • Flores Ballroom

Breakfast in The Exchange

8:30 AM – 9:00 AM • Fiesta 1-8

General Session

ABA Chair Remarks

John Asbury, *ABA Chair & CEO of Atlantic Union Bankshares Corporation*

9:00 AM – 9:15 AM • Fiesta 1-8

General Session

Vendor Showcase

9:15 AM – 10:00 AM • Fiesta 1-8

General Session

Fintech: Leveling the Playing Field for Community and Regional Banks

Carey Ransom, *Managing Director, BankTech Ventures*

Mike Sekits, *Co-Founder & Managing Director, Strandview Capital*

Jonathan Bresler, *Managing Partner, EJV Ventures*

Moderator: Rick Sowers, *President & CEO, CalPrivate Bank*



10:00 AM – 10:25 AM • Flores Ballroom

Refreshments in The Exchange

10:25 AM – 11:10 AM • BREAKOUT SESSIONS

Breakout Session #1 • Fiesta 1-8

Directors Track • Fiesta 13-14

Wildfire Recovery & Readiness:

What Banks Need to Know

Chang Liu, *President & CEO, Cathay Bank*
Chris Wong, *Managing Director, Strategy Executive, Bank of America*
Anders Corey, *Housing, Planning and Land-Use Deputy, Los Angeles County Board of Supervisors*
Christine Kwon, *Team Leader, Department of Angels*
Moderator: Stan Ivie, *EVP, Head of Government and Regulatory Affairs, Banc of California*

Director Bootcamp – Session One

Mark Aldrich, *Founder, Principal, Aldrich & Bonnefin*
Joel Cook, *Principal & CEO, Aldrich & Bonnefin*

11:15 AM – 12:00 PM • Fiesta 1-8

General Session

Oversight Outlook: The Current Era of Banking Regulation

Paul Worthing, *Regional Director, San Francisco Region, FDIC*
Richard Dixon, *Associate Deputy Comptroller, OCC*
Mongkha Pavlick, *Senior Vice President, Supervision + Credit, FRBSF*
Moderator: Stan Ivie, *EVP, Head of Government and Regulatory Affairs, Banc of California*

12:00 PM – 1:20 PM • Flores Ballroom

Lunch in The Exchange

12:40 PM – 1:15 PM • REGULATOR ONE-ON-ONE MEETINGS

Plaza 1 *(By Appointment Only)*

Plaza 2 *(By Appointment Only)*

Plaza 3 *(By Appointment Only)*

Paul Worthing

Regional Director, SF Region, FDIC

Richard Dixon

Associate Deputy Comptroller, OCC

Mongkha Pavlick

SVP, Supervision + Credit, FRBSF

1:20 PM – 1:30 PM • Fiesta 1-8

General Session

Vendor Showcase

1:30 PM – 2:15 PM • Fiesta 1-8

General Session

Bridging the Balance: CRE Lending at a Crossroads

Thomas Whitesell, *Head of Debt Investment, Kennedy Wilson*
Mark Fluent, *Vice Chairman, CBRE*

2:15 PM – 2:40 PM • Flores Ballroom

Refreshments in The Exchange



2:10 PM – 2:45 PM • REGULATOR ONE-ON-ONE MEETINGS

Plaza 1 (By Appointment Only)

Paul Worthing
Regional Director, SF Region, FDIC

Plaza 2 (By Appointment Only)

Richard Dixon
Associate Deputy Comptroller, OCC

Plaza 3 (By Appointment Only)

Mongkha Pavlick
SVP, Supervision + Credit, FRBSF

2:40 PM – 3:25 PM • Fiesta 1-8
General Session

A Conversation with Mary Daly & Krista Snelling
Mary C. Daly, President & CEO, Federal Reserve Bank of San Francisco
Krista Snelling, Chair, California Bankers Association, President & CEO, West Coast Community Bank

3:30 PM – 4:15 PM • Fiesta 1-8
General Session

**The Current Banking Landscape:
Where We Are, How We Got Here, and Where Are We Heading**
David Feaster, Director, Raymond James

4:15 PM – 5:30 PM • Fiesta 9

Peer Networking (Bankers Only)
*Open Bar – Beer & Wine

Evening Open for Vendor Dinners

Thursday, May 15, 2025

7:30 AM – 3:30 PM • Flores Ballroom

Registration Open (Located in *The Exchange*)

7:30 AM – 1:15 PM • Flores Ballroom

The Exchange Open

7:30 AM – 8:30 AM • Flores Ballroom

Breakfast in The Exchange

7:55 AM – 8:30 AM • REGULATOR ONE-ON-ONE MEETINGS

Plaza 1 (By Appointment Only)

Paul Worthing
Regional Director, SF Region, FDIC

Plaza 2 (By Appointment Only)

Richard Dixon
Associate Deputy Comptroller, OCC

Plaza 3 (By Appointment Only)

Mongkha Pavlick
SVP, Supervision + Credit, FRBSF

8:30 AM – 9:15 AM • Fiesta 1-8
General Session

Market Moves: An Economic Review
Scott Anderson, Ph.D., Chief U.S. Economist and Managing Director, BMO



9:15 AM – 9:25 AM • Fiesta 1-8

General Session

Vendor Showcase

9:15 AM – 9:50 AM • REGULATOR ONE-ON-ONE MEETINGS

Plaza 1 (By Appointment Only)

Plaza 2 (By Appointment Only)

Plaza 3 (By Appointment Only)

Paul Worthing

Regional Director, SF Region, FDIC

Richard Dixon

Associate Deputy Comptroller, OCC

Mongkha Pavlick

SVP, Supervision + Credit, FRBSF

9:25 AM – 9:45 AM • Flores Ballroom

Refreshments in The Exchange

9:45 AM – 10:30 AM • BREAKOUT SESSIONS

Breakout Session #1 • Fiesta 1-8

Breakout Session #2 • Fiesta 10

Directors Track • Fiesta 13-14

How Community Banks Can Tackle Digital Transformation

David Wexler, CEO and Co-Founder, PortX

Graduate Schools of Banking Panel

*Joan Reukauf, President & CEO, Pacific Coast Banking School
Michael Stevens, President & CEO, GSB at Colorado
Kathleen Berman, VP, Marketing & Communications, GSB at the University of Wisconsin – Madison*

Director Bootcamp – Session Two

Joel Cook, Principal & CEO, Aldrich & Bonnefin

10:35 AM – 11:15 AM • Fiesta 1-8

General Session

Beyond the Glass Ceiling: Building Pathways for the Next Generation

*Edythe Repoff, President & Chief Operating Officer, New Omni Bank, N.A.
Mickey McGuire, CIO and Director of Bank Operations, HCN Bank
Vida Villanueva, EVP – Chief Operating Officer, Monterey County Bank
Moderated by: Lauren Sarkisian, Business Development Director, CSI & Jessica Defraties, Business Development Director, CSI*

11:15 AM – 11:20 AM • Fiesta 1-8

General Session

Vendor Showcase

11:20 AM – 12:05 PM • Fiesta 1-8

General Session

Incorporating M&A into Corporate Strategy

*Aaron Axton, Managing Director, Keefe, Bruyette & Woods, A Stifel Company
John Asbury, ABA Chair & CEO of Atlantic Union Bankshares Corporation
Krista Snelling, Chair, California Bankers Association, President & CEO, West Coast Community Bank*



12:05 PM – 1:15 PM • Flores Ballroom

Lunch in The Exchange

12:25 PM – 1:20 PM • REGULATOR ONE-ON-ONE MEETINGS

Plaza 1 (By Appointment Only)

Paul Worthing

Regional Director, SF Region, FDIC

Plaza 2 (By Appointment Only)

Richard Dixon

Associate Deputy Comptroller, OCC

Plaza 3 (By Appointment Only)

Mongkha Pavlick

SVP, Supervision + Credit, FRBSF

1:15 PM • Flores Ballroom

Exhibitor Tear Down

1:15 PM – 2:15 PM • Las Brisas 1

Peer Networking: Directors

1:15 PM – 2:15 PM • Las Brisas 2

Peer Networking: Mid-Sized Banks

1:15 PM – 2:15 PM • Las Brisas 3

Peer Networking: Community Banks

2:20 PM – 3:05 PM • BREAKOUT SESSIONS

Breakout Session #1 • Fiesta 1-8

Breakout Session #2 • Fiesta 10

Directors Track • Fiesta 13-14

**AI for Cautious Leaders:
Taking the First Step with Confidence**

Jarrood Koch, CEO & Partner, DivergeIT

**How to Motivate and Retain Key
Officers and Employees Outside of
Salary and Cash Incentives**

*Mike Blanchard, CEO,
Blanchard Consulting Group*

**Wisdom at the Table:
The CEO's Journey to the Board Room**

*Marty Plourd, President,
Community West Bancshares
Tom Wornham, Director, CalPrivate Bank
Moderator: Adam Keefer,
Managing Director, Piper Sandler*

3:05 PM – 3:20 PM • Fiesta Ballroom Foyer

Refreshments

3:20 PM – 4:20 PM • Fiesta 1-8

Closing General Session

EVEREST RESILIENCE: Overcoming Adversity and Reaching High Goals

Jim Davidson, Expedition Leader, Survivalist, and Author

4:20 PM – 4:30 PM • Fiesta 1-8

Closing Remarks

Closing Remarks & Vendor Adventure Raffle Prize Drawing

Marty Plourd, President, Community West Bank



6:00 PM – 6:30 PM • La Casa Complex
Reception

Lights, Camera, Banking!
Attire: Glitz, Glam, Old Hollywood, etc.

6:30 PM – 8:30 PM • La Casa Complex
Dinner & Entertainment

Lights, Camera, Banking!
Attire: Glitz, Glam, Old Hollywood, etc.

Friday, May 16, 2025

8:00 AM – 10:30 AM • Main Pool &
Pickleball Courts

The Last Rally: Pickleball & Brunch
Attire: Athleisure

Conference Concludes

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