



2026 ANNUAL CONFERENCE and DIRECTORS FORUM

The Ritz-Carlton Maui Kapalua
www.calbankers.com/events/ac26



Agenda Sponsored by:



Tuesday, May 12, 2026

11:00 AM – 4:00 PM • Aloha Garden Pavilion

Registration Open

12:00 PM – 12:50 PM • Aloha Garden Pavilion

Pavilion Sip & Social

Come Enjoy Snacks, Beer, Wine, Mai-Tais, and Great Company!

12:00 PM – 3:05 PM • Aloha Garden Pavilion

The Pavilion Open

1:00 PM – 1:05 PM • Salon 1-3

Conference Welcome and Opening Remarks

Kevin Gould, President & CEO, California Bankers Association

1:05 PM – 1:40 PM • Salon 1-3

General Session & Conference Blessing

Maui Rising: Recovery, Rebuilding, and the Road Ahead

Richard T. Bissen Jr., Mayor of Maui County

Josiah Nishita, Managing Director, County of Maui

Keanu Lau Hee, VP of Community Resilience and Strategic Implementation, Hawaii Community Foundation

Moderated by: Bryan Luke, President & CEO, Hawaii National Bank

Opening Oli & Blessing Offered By: Kumu Hula Cody Pueo Pata

1:40 PM – 2:40 PM • Salon 1-3

Keynote – General Session

High Trust, High Execution & The Glad To Be Here® Mindset

John "Gucci" Foley, Blue Angel Lead Solo Pilot, Stanford Fellow, Best-Selling Author & "Gratitude Guru"



2:40 PM – 3:05 PM • Aloha Garden Pavilion

Refreshments & Networking

3:05 PM – 3:45 PM • Salon 1-3

General Session

2026 State and Federal Legislative Update

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

3:45 PM – 4:30 PM • Salon 1-3

General Session

Community Banking Through the Eyes of the Investor Community

Kelly Motta, *Managing Director, Keefe, Bruyette & Woods, A Stifel Company*

5:30 PM – 6:30 PM • Makai Lawn

Welcome Reception

Pacific Pā'ina

Attire: Resort Attire / Business Casual

Sponsored by: KlariVis

Evening Open

Wednesday, May 13, 2026

7:30 AM – 4:00 PM • Aloha Garden Pavilion

Registration Open

7:30 AM – 3:20 PM • Aloha Garden Pavilion

The Pavilion Open

7:30 AM – 8:30 AM • Aloha Garden Pavilion

Breakfast & Networking

Breakfast Sponsored by: Figure

8:30 AM – 9:15 AM • Salon 1-3

General Session

Strategic Horizons: Economic Insights for Leaders

Phil Mackintosh, *Chief Economist, Nasdaq*

9:15 AM – 9:30 AM • Salon 1-3

General Session

Vendor Showcase

9:35 AM – 10:15 AM • BREAKOUT SESSIONS

Breakout Session #1 • Salon 4

Directors Track • Plantation Ballroom

**The Future of Banking, The More Things Change,
The More They Stay the Same**

Preston Afrank, *Senior Executive Vice President, Haberfeld*

**Beyond Compliance –
Building Internal Control Governance That Scales**

Casey Sanderson, *Partner, Forvis Mazars*

10:15 AM – 10:45 AM • Aloha Garden Pavilion

Refreshments & Networking

Refreshments Sponsored by: Select Bankcard



10:45 AM – 11:25 AM • BREAKOUT SESSIONS

Breakout Session #1 • Salon 4

Directors Track • Plantation Ballroom

Your Finance Team: The Critical Link between Strategic Planning and Execution

Bryan Ridgway, *Director of Performance Management Solutions, Empyrean Solutions*

Staying Ahead of Risk: Insurance Insights for Directors

Kathryn Judson, *VP, Employee Benefits, Gallagher*
Jimmy Houlihan, *VP | Financial Institutions Practice, Gallagher*

11:30 AM – 12:25 PM • Salon 1-3
General Session

Riding The Regulatory Wave

Paul Worthing, *Regional Director, San Francisco Region, FDIC*
Karen Boehler, *Deputy Comptroller for the West and Midwest Regions, OCC*
Roberta Hollinshead, *SVP, Community & Regional Institution Supervision, FRBSF*
Moderated by: Stan Ivie, *CBA Past Chair*

12:25 PM – 12:40 PM • Salon 1-3

Presentation of CBA's Distinguished Banker Award

12:40 PM – 1:50 PM • Aloha Garden Pavilion

Lunch & Networking

Lunch Sponsored by: Primax

1:10 PM – 1:45 PM • REGULATOR ONE-ON-ONE MEETINGS

Kaua'i (By Appointment Only)

Lana'i (By Appointment Only)

Hawai'i (By Appointment Only)

Paul Worthing

Regional Director, SF Region, FDIC

Karen Boehler

Deputy Comptroller for the West and Midwest Regions, OCC

Roberta Hollinshead

SVP, Community & Regional Institution Supervision, FRBSF

1:50 PM – 2:35 PM • Salon 1-3
General Session

The Modern Bank: Technology, Strategy, and Change

Paulo Bernasconi, *GM, Column Holdings, Column*
Steve Miller, *President & CEO, FFB Bank*
Rick Sowers, *President & CEO, CalPrivate Bank*
Moderated by: Todd Lewis, *President & CFO, Column NA/Northern California National Bank*

2:35 PM – 2:50 PM • Salon 1-3
General Session

Vendor Showcase

2:50 PM – 3:20 PM • Aloha Garden Pavilion

Refreshments & Networking

Refreshments Sponsored by: Select Bankcard



2:45 PM – 3:20 PM • REGULATOR ONE-ON-ONE MEETINGS

Kaua'i (By Appointment Only)

Lana'i (By Appointment Only)

Hawai'i (By Appointment Only)

Paul Worthing

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Karen Boehler

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Roberta Hollinshead

SVP, Community & Regional Institution Supervision, FRBSF

3:20 PM – 3:50 PM • BREAKOUT SESSIONS

Breakout Session #1 • Salon 4

Directors Track • Plantation Ballroom

Building a Fraud-Forward Future:

Collaboration, Culture, and Innovation in Banking

Krista Snelling, *Chairman & CEO, West Coast Community Bank*

Troy Sanderson, *President & CEO, Exchange Bank*

Lydia Ramirez, *EVP & COO, Five Star Bank*

Moderated by: Jeff Scott, *VP, Product Management, Q2*

Inside the Boardroom:

Director Perspectives on Today's Most Pressing Issues

Marty Plourd, *Director, Community West Bancshares*

Bob Perry-Smith, *Chairperson of the Board, Five Star Bank*

Teresa Matsui, *Director, Pacific Valley Bank*

3:50 PM – 4:35 PM • Anuenue

Peer Networking Happy Hour (Bankers Only)

Open Bar

Evening Open

Thursday, May 14, 2026

8:00 AM – 2:45 PM • Aloha Garden Pavilion

Registration Open

8:00 AM – 1:45 PM • Aloha Garden Pavilion

The Pavilion Open

8:00 AM – 9:00 AM • Aloha Garden Pavilion

Breakfast & Networking

Breakfast Sponsored by: Saris AI

8:25 AM – 9:00 AM • REGULATOR ONE-ON-ONE MEETINGS

Kaua'i (By Appointment Only)

Lana'i (By Appointment Only)

Hawai'i (By Appointment Only)

Paul Worthing

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Karen Boehler

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Roberta Hollinshead

SVP, Community & Regional Institution Supervision, FRBSF



9:00 AM – 9:40 AM • Salon 1-3
General Session

**Digital Assets and the Fight for Deposits:
What Community Banks Need to Know**
Michel Jacobs, *Chief Strategy Officer, CSI*

9:40 AM – 9:55 AM • Salon 1-3
General Session

Vendor Showcase

10:05 AM – 10:35 AM • BREAKOUT SESSIONS

Breakout Session #1 • Salon 4

Directors Track • Plantation Ballroom

Friend or Foe? Private Credit in the Banking System

Matt Ashworth, *Managing Director, Hyperion Risk Management LLC*

Measuring and Improving Board Effectiveness

Brian Argrett, *Chairman & CEO, City First Bank*

Jim Hale, *Board Chair, Bank of Marin*

Moderated by: Kaley Karaffa, *Head of Board Advisory, Nasdaq*

10:25 AM – 11:00 AM • REGULATOR ONE-ON-ONE MEETINGS

Kaua'i (By Appointment Only)

Lana'i (By Appointment Only)

Hawai'i (By Appointment Only)

Paul Worthing

Regional Director, SF Region, FDIC

Karen Boehler

*Deputy Comptroller for the West and
Midwest Regions, OCC*

Roberta Hollinshead

*SVP, Community & Regional Institution
Supervision, FRBSF*

10:35 AM – 10:55 AM • Aloha Garden Pavilion

Refreshments & Networking

Refreshments Sponsored by: Piper Sandler

10:55 AM – 11:25 AM • Salon 1-3
General Session

Remarks from the American Bankers Association

Rob Nichols, *President & CEO, American Bankers Association*

11:30 AM – 12:15 PM • Anuenue

Peer Networking: Directors (Bankers Only)

11:30 AM – 12:15 PM • Hawaiian Garden

Peer Networking: Mid-Sized Banks (Bankers Only)

11:30 AM – 12:15 PM • Plantation Lanai

Peer Networking: Community Banks (Bankers Only)

12:15 PM – 1:30 PM • Aloha Garden Pavilion

Lunch & Networking



12:35 PM – 1:30 PM • REGULATOR ONE-ON-ONE MEETINGS

Kaua'i (By Appointment Only)

Lana'i (By Appointment Only)

Hawai'i (By Appointment Only)

Paul Worthing

Regional Director, SF Region, FDIC

Karen Boehler

Deputy Comptroller for the West and Midwest Regions, OCC

Roberta Hollinshead

SVP, Community & Regional Institution Supervision, FRBSF

1:30 PM – 1:45 PM • Salon 1-3

Vendor & Paradise Prize Drawing Announcements

1:45 PM – 2:30 PM • Salon 1-3

General Session

Bank M&A in the Current Cycle: From Opportunity to Obligation

Aaron DiRusso, Managing Director, Raymond James

1:45 PM • Aloha Garden Pavilion

Exhibitor Tear Down

2:30 PM – 3:30 PM • Salon 1-3

Closing General Session

The Weight You Cannot See:

The Hidden Work of Leadership in a High Pressure Industry

Christopher Thompson, Executive Coach, Keynote Speaker, Master Facilitator, Author, CORE Inclusive Consulting

5:30 PM – 8:00 PM • Beach House Lawn

Reception, Dinner & Entertainment

Closing 'Aha'aina

Attire: Resort Attire

Entertainment Sponsored by: IntraFi

Friday, May 15, 2026

8:00 AM – 12:00 PM • Anuenue

Aloha Oe'

Enjoy a light breakfast and a relaxed lounge space—perfect while you wait to depart or take in a slow, easy morning.

8:30 AM – 2:00 PM • Kapalua Golf –

The Plantation Course

Golf Tournament – Shotgun Start at 9:30 AM

Beverage Tickets Sponsored by: Crowe

Conference Concludes

SCAN ME TO COMPLETE
THE CONFERENCE SURVEY!
(CHANCE TO WIN \$100 AMAZON GIFT CARD)



SCAN HERE TO VIEW
CONFERENCE HANDOUTS!



THANK YOU TO OUR SPONSORS!



Chairman Circle



KEEFE, BRUYETTE & WOODS
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Platinum



Gold



American Bankers Association



by S&P Global





Paradise PRIZE DRAWING

*Banker Participation Only



HOW TO ENTER:

Visit participating sponsor booths to collect prize tickets. Write your name clearly on each ticket, then place it in the bowl for the prize you wish to win. All prize bowls are located at CBA registration.

PRIZES:

- SCOTTY CAMERON PUTTER: PHANTOM 5
- OURA RING 4
- \$200 AMAZON GIFT CARD

Winners will be announced at 1:30 p.m. HST on Thursday, May 14th in the General Session Room. **Must be present to win.** Item(s) will be shipped within 7–10 business days following the conference.

A FREE REGISTRATION. EVERY MEMBER BANK. EVERY IN-PERSON CONFERENCE.



Don't forget! We're giving back to our bank members in a big way! In 2026, every CBA member bank receives one FREE registration to each of our in-person conferences. There are still three more opportunities to utilize this benefit. Have someone from your team join us for networking, learning, and innovation – all included with your membership.

To claim your FREE registration or for questions, please contact registrations@calbankers.com

Just email us your attendee name and conference selection. We'll handle the rest! **It's that easy.**



The California Bankers Association.
Celebrating 135 years.
Bringing Members Together. Making Our Banks Better.

Our mission is to advocate for the California banking industry and support our members as they advance the financial success of their customers, communities, and the economy.

