

Annual Conference

April 19-22, 2024
Island of Hawaii 🌿 Hawaii
Fairmont Orchid



Agenda At-A-Glance Sponsored by:



Agenda At-A-Glance

Friday, April 19

6:45 AM – 7:45 AM • Mauna Lani South Course

Golf Tournament Breakfast/Check In

7:45 AM • Mauna Lani South Course

Golf Tournament Lead Out

- Golf Pros will lead the Golf Group out to their starting hole

8:00 AM – 1:00 PM • Mauna Lani South Course

Golf Tournament Shotgun Start

2:00 PM – 4:00 PM • Paniolo Lounge

Registration Open

2:00 PM – 4:00 PM • Salon 2,3

Exhibitor Setup

4:30 PM – 5:30 PM • Coconut Grove

Welcome Reception “Toes in the Sand”

Evening
Open
for Vendor
Dinners

Saturday, April 20

8:00 AM – 4:00 PM • Paniolo Lounge

Registration Open

8:00 AM – 9:00 AM • Salon 2,3

Breakfast & Dedicated Marketplace Time

8:00 AM – 3:30 PM • Salon 2,3

Marketplace Open

9:00 AM – 10:00 AM • Salon 1

Keynote Speaker Sponsored by:
Woodside Credit

Welcome & Opening General Session — A Morning with Billy Beane

- Billy Beane, Senior Adviser to Oakland Athletics Owner John Fisher
Arrangements for the appearance of Billy Beane made through UTA Speakers, New York, NY

10:00 AM – 10:30 AM • Salon 2,3

Morning Break & Dedicated Marketplace Time

10:30 AM – 10:45 AM • Salon 1

Vendor Showcase

10:45 AM – 11:45 AM • Salon 1

General Session — Regulator Panel

- Paul Worthing, Regional Director, San Francisco Region, FDIC
- Karen Boehler, Deputy Comptroller for the West and Midwest Regions, OCC
- Joe Lozano, Vice President, Division of Financial Institution, Supervision + Credit, FRBSF
- Moderator: Stan Ivie, EVP, Head of Government and Regulatory Affairs, Banc of California

11:45 AM – 1:00 PM • Salon 2,3

Lunch & Dedicated Marketplace Time

12:15 PM – 1:00 PM • REGULATOR ONE-ON-ONE MEETINGS

The Boardroom (By Appointment Only)

Paul Worthing

Regional Director, San Francisco Region, FDIC

Pikake (By Appointment Only)

Karen Boehler

Deputy Comptroller for the West and Midwest Regions, OCC

Hibiscus (By Appointment Only)

Joe Lozano

Vice President, Division of Financial Institution, Supervision + Credit, FRBSF

1:00 PM – 2:00 PM • Salon 1

General Session — CORE Providers Panel

- Chris Bureau, VP Sales, Fiserv
- Anthony Calozza, Sales Executive, Jack Henry
- Melanie Tomlinson, Head of Market Strategy, Sales Growth Office, Banking and Corporates, FIS
- Moderated by: Kevin McPhaill, President & CEO, Bank of the Sierra

2:00 PM – 3:00 PM • Salon 1

General Session — Legislative Update

- Kevin Gould, President & Chief Executive Officer, California Bankers Association
- Jason Lane, Senior Vice President, Director of Government Relations, California Bankers Association
- Melanie Cuevas, Vice President of Government Relations, California Bankers Association

3:00 PM – 3:30 PM • Salon 2,3

Afternoon Break & Dedicated Marketplace Time

3:30 PM – 4:30 PM • Salon 1

General Session — Overcoming Impediments in a Difficult M&A Environment

- Jeff Wishner, Managing Director, Keefe, Bruyette & Woods, A Stifel Company
- Kathy Moe Lonowski, Regulatory/Banking Executive
- Michael Reed, Partner, Covington

Evening
Open
for Vendor
Dinners

Sunday, April 21

7:30 AM – 3:00 PM • Paniolo Lounge

Registration Open

7:30 AM – 8:30 AM • Salon 2,3

Breakfast & Dedicated Marketplace Time

7:30 AM – 2:45 PM • Salon 2,3

Marketplace Open

8:00 AM – 8:30 AM • REGULATOR ONE-ON-ONE MEETINGS

The Boardroom (By Appointment Only)

Paul Worthing
Regional Director, San Francisco
Region, FDIC

Pikake (By Appointment Only)

Karen Boehler
Deputy Comptroller for the
West and Midwest Regions, OCC

Orchid (By Appointment Only)

Joe Lozano
Vice President, Division of Financial
Institution, Supervision + Credit, FRBSF

8:30 AM – 8:45 AM • Salon 1

Vendor Showcase

8:45 AM – 10:00 AM • Salon 1

General Session — Embracing the New CRE | How Today's Landscape Has Reshaped Investment Opportunity

- Kevin Colombo, Executive Vice President, Colliers
- Kitty Wallace, Senior Executive Vice President, Colliers
- Steig Seaward, Senior Director, National Research, Colliers

10:00 AM – 10:30 AM • Salon 2,3

Morning Break & Dedicated Marketplace Time

10:00 AM – 10:30 AM • REGULATOR ONE-ON-ONE MEETINGS

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10:30 AM – 11:15 AM • LEARNING SESSIONS

Learning Session 1 • Salon 1

Managing Liquidity Risk in Turbulent Waters

- Mark Haberland, Managing Director, Darling Consulting Group
- Max Damm, Managing Director, IntraFi

Learning Session 2 • Lehua Theatre

Climate Risk and Opportunity Management

- Francis Janes, Industry Relations and Partnerships Director, Beneficial State Foundation

Directors Track • Promenade Ballroom

Succession Planning

- Aaron Axton, Managing Director, Keefe, Bruyette & Woods, A Stifel Company
- Russ Colombo, Former President & CEO, Bank of Marin and Bank of Marin Bancorp; Director – Bank of Marin and Bank of Marin Bancorp
- Mike Lasher, President, Community Commerce Bank

11:30 AM – 12:15 PM • Salon 1

General Session — ABA President & CEO Remarks

- Rob Nichols, President & CEO, American Bankers Association

12:15 PM – 1:30 PM • Salon 2,3

Lunch & Dedicated Marketplace Time

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

The Boardroom (By Appointment Only)

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Vice President, Division of Financial
Institution, Supervision + Credit, FRBSF

1:30 PM – 2:15 PM • Salon 1

Disaster Recovery & Resilience

- Linda Ezuka, Executive Director, Hawaii Bankers Association
- Dan Bailey, EVP & Chief Banking Officer, Tri Counties Bank

2:15 PM – 2:45 PM • Salon 2,3

Afternoon Break & Dedicated Marketplace Time

2:45 PM – 3:45 PM • Plaza Ballroom

Peer Networking with pro-voke (*Bankers Only*)



Monday, April 22

7:30 AM – 3:30 PM • Paniolo Lounge

Registration Open

7:30 AM – 8:30 AM • Salon 2,3

Breakfast & Dedicated Marketplace Time

7:30 AM – 1:15 PM • Salon 2,3

Marketplace Open

8:30 AM – 8:45 AM • Salon 1

Exhibitor Prize Drawings

8:45 AM – 9:45 AM • Salon 1

General Session — Value versus Price

- Marty Plourd, Director & CEO, Community West Bank
- James Kim, President & CEO, Central Valley Community Bank
- David Gershon, Partner, Sheppard Mullin
- Moderator: Peter Buck, Managing Director, Piper Sandler

9:45 AM – 10:00 AM • Salon 2,3

Morning Break & Dedicated Marketplace Time

10:00 AM – 10:45 AM • LEARNING SESSIONS

Learning Session 1 • Salon 1

An Update on the New CRA Rules and Litigation to Block those Rules

- Brian Montgomery, Senior Counsel, Pillsbury

Learning Session 2 • Lehua Theatre

Evolution of CRE & Credit: Recent Stories from a Loan Review Backpackers Journey

- Steve Kruse, Principal, Crowe LLP

Directors Track • Promenade Ballroom

Director Compensation and Compensation Committee Best Practices

- Mike Blanchard, CEO, Blanchard Consulting

11:00 AM – 12:00 PM • PEER EXCHANGE SESSIONS

Hibiscus

Director Peer Exchange Session

Orchid

Mid-Sized Bank Peer Exchange

Ilima

Community Bank Peer Exchange

12:00 PM – 1:15 PM • Salon 2,3

Lunch & Dedicated Marketplace Time

1:15 PM • Salon 2,3

Exhibitor Tear Down

1:15 PM – 2:00 PM • LEARNING SESSIONS

Learning Session 1 • Salon 1

Data-Driven Banking: Unlocking the Power of Analytics for Growth and Success

- David Heneke, Principal, CLA
- Joshua Juergensen, Principal, CLA

Learning Session 2 • Lehua Theatre

AI Unleashed: Transforming Banking in the Digital Era

- Eric Devine, President & CEO, Vitex

Directors Track • Promenade Ballroom

Leveling Up: Effective Governance and the Internal Audit Function

- Noory Song, Senior Manager, Moss Adams
- Chris Wetzel, Director, Moss Adams

2:00 PM – 2:15 PM • Salon 1 Foyer

Afternoon Break

2:15 PM – 3:00 PM • Salon 1

General Session — Strategies to Accelerate Business Deposit Growth

- Lori Shao, CEO & Founder, Finli

SMBs Going Global: Unlock Revenue for your Bank with Safer Cross Border Payments

- Saujin Yi, Founder/CEO, LiquidTrust

3:00 PM – 4:00 PM • Salon 1

Closing General Session — Secure Data Sharing: The Competitive Carrot & the Compliance Stick

- Jane Barratt, Chief Advocacy Officer and Head of Global Public Policy, MX
- George Leis, President & Chief Operating Officer, Montecito Bank & Trust

5:00 PM – 5:30 PM • Turtle Pointe

Farewell Reception

5:30 PM – 8:00 PM • Turtle Pointe

Farewell Dinner