



Lenders & Chief Credit Officers Conference

Agenda At-A-Glance

PRESENTED BY



CALIFORNIA BANKERS ASSOCIATION

SPONSORED BY



SUNDAY, OCTOBER 23, 2022

| | | |
|--------------------|--|--|
| 12:00 PM – 5:30 PM | Registration | <i>Pacific Promenade Foyer</i> |
| 12:00 PM – 1:00 PM | Exhibitor Set-Up | <i>Pacific Promenade Foyer</i> |
| 1:00 PM – 2:15 PM | Welcome & Opening General Session Steven Cibull, Vice President, Mortgage Finance, Federal Home Loan Bank of San Francisco | <i>Pacific Promenade 1,2</i> |
| 2:15 PM – 2:30 PM | Afternoon Break — Sponsored by Integrity Joint Control | <i>Pacific Promenade Lawn</i> |
| 2:30 PM – 3:30 PM | The Loan From Hell Barry Smith, Shareholder, Buchalter <i>Pacific Promenade 1,2</i> | Growing Your Small Business Lending Program Gord Baizley, CEO, JUDI.AI <i>Pacific Promenade 3</i> |
| 3:45 PM – 4:45 PM | Utilizing Interest Rate Swaps to Increase Loan Growth and Remain Competitive Amber Evanco, EVP, Managing Director, PNC Capital Markets <i>Pacific Promenade 1,2</i> | Innovating through Digital Transformation Richard Fay, Principal, Wolf & Company, PC <i>Pacific Promenade 3</i> |
| 4:45 PM – 5:45 PM | Welcome Reception — Sponsored by Abrigo | <i>Pacific Promenade Lawn</i> |

MONDAY, OCTOBER 24, 2022

| | | |
|---------------------|---|--------------------------------|
| 8:00 AM – 3:15 PM | Registration | <i>Pacific Promenade Foyer</i> |
| 8:00 AM – 9:00 AM | Breakfast — Sponsored by Biz2x | <i>Pacific Promenade Lawn</i> |
| 9:00 AM – 10:00 AM | Legislative Update Kevin Gould, EVP, Director of Government Relations, California Bankers Association Melanie Cuevas, VP of Government Relations, California Bankers Association | <i>Pacific Promenade 1,2</i> |
| 10:00 AM – 10:30 AM | Morning Break — Sponsored by NorthWest Construction Control | <i>Pacific Promenade Lawn</i> |





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10:30 AM – 11:30 AM

Digital Consumer Lending

Dan Roderick, Chief Executive Officer,
Strunk/ Quilo

Pacific Promenade 1,2

Swaps: The Best Available Tool in Volatile and Uncertain Times

Ben Lewis, Managing Director &
Global Head of Sales, Financial
Institutions, Chatham Financial

Pacific Promenade 3

11:30 AM – 12:45 PM

Lunch — Sponsored by Chatham Financial

Pacific Promenade Lawn

12:45 PM – 1:45 PM

Where is the CFPB now?

Michael Flynn, Of Counsel, Buchalter

Pacific Promenade 1,2

Loan Growth Through Technology and Automation – Can Your Institution Handle the Change?

Rob Newberry, Senior Advisor, Abrigo

Pacific Promenade 3

1:45 PM – 2:00 PM

Afternoon Break — Sponsored by JUDI.AI

Pacific Promenade Lawn

2:00 PM – 3:00 PM

Uncertainty on the Horizon: The Balance Between Loan Growth & Credit Quality

Erica Crain, Principal, CLA & Dustin Morris,
Director of Credit Risk Services, CLA

Pacific Promenade 1,2

LIBOR/SOFR Transition and the Impact of the Adjustable Interest Rate (LIBOR) Act

Zachary Davis, Esq., Senior Associate,
Luse Gorman, PC

Pacific Promenade 3

3:15 PM – 4:30 PM

Peer Exchange Session

Pacific Promenade Lawn

Evening Open for Vendor Dinners

TUESDAY, OCTOBER 25, 2022

8:00 AM – 10:30 AM

Registration

Pacific Promenade Foyer

8:00 AM – 9:00 AM

Breakfast — Sponsored by Compliance Systems

Pacific Promenade Lawn

9:00 AM – 10:00 AM

Instant Credit Decisioning: What Every Banker Needs to Know

Rohit Arora, CEO, Biz2X

Pacific Promenade 1,2

Countermoves: How to Tap Into Fintech

Paul Davis, Director of Market
Intelligence, SRM

Pacific Promenade 3

10:00 AM – 10:15 AM

Morning Break — Sponsored by Qualtik

Pacific Promenade Lawn

10:15 AM – 11:15 AM

Why a FinTech Partner in a Rising Rate Environment

Nik Vukovich, Director Financial Institution Partnerships,
Upgrade, Inc.

Pacific Promenade 1,2

