



# **2025** **Lenders & Chief Credit Officers** **Conference**

**October 7-8, 2025**  
Hyatt Regency Orange County

**AGENDA-AT-A-GLANCE**

# AGENDA

TUESDAY | OCTOBER 7TH

**10:00 AM - 4:30 PM**

Royal Ballroom Foyer

**Registration Open**

**1:00 PM - 1:45 PM**

Royal Ballroom C,D,E,F

**Hot Topics in Credit:  
Perspectives from the C-Suite**

**Bryan Corsini**, *EVP, Chief Credit Officer, Banc of California*  
**Jack Dalton**, *SVP, Chief Credit Officer, Five Star Bank*  
**Moderated by: Hitesh Bajaria**, *Regional VP, Business Development & Relationship Manager, TASI Bank*

**1:45 PM - 2:30 PM**

Royal Ballroom C,D,E,F

**The California Legislature and the Courts:  
What Creditors Need to Know**

**Robert McWhorter**, *Shareholder, Buchalter*  
**Moderated by: Kevin Gould**, *President & CEO, California Bankers Association*

**2:30 PM - 3:15 PM**

Royal Ballroom C,D,E,F

**CECL in Practice:  
Strategies, Insights, and Lessons Learned**

**Kevin Brand**, *Partner, Crowe*  
**Kirk Briden**, *Founder & CEO, Banker's Caddy*  
**Kelly Bruns**, *President & CEO, Premier Audit Solutions*  
**Moderated by: Anthony Moreno**, *SVP/Chief Credit Officer, First Federal of San Rafael*

**3:15 PM - 3:35 PM**

Royal Ballroom C,D,E,F

**Afternoon Break & Vendor Networking**

**3:35 PM - 4:20 PM**

Royal Ballroom C,D,E,F

**Navigating Heightened Credit Stress:  
Strategies for What's Next**

**David Ruffin**, *Principal, IntelliCredit*

**4:20 PM - 5:05 PM**

Royal Ballroom C,D,E,F

**Former Regulator AMA (Ask Me Anything):  
Everything You Were Ever Afraid to Ask and  
Everything They Never Told You**

**Matthew Ashworth**, *Managing Director, Hyperion Risk Management LLC*  
**Moderated by: Anthony Moreno**, *SVP/Chief Credit Officer, First Federal of San Rafael*

**5:05 PM - 6:05 PM**

Royal Ballroom C,D,E,F

**Networking Reception (Evening Open)**

## WEDNESDAY | OCTOBER 8TH

**8:00 AM - 4:30 PM**

Royal Ballroom Foyer

**Registration Open**

**8:00 AM - 9:00 AM**

Royal Ballroom C,D,E,F

**Breakfast & Vendor Networking**

**9:00 AM - 9:45 AM**

Royal Ballroom C,D,E,F

**Making More of Loan Review:  
Leveraging Data Collection for Deeper Analysis**  
**Mike Fletcher**, *Co-Founder & President, Qualtik*

**9:45 AM - 10:30 AM**

Royal Ballroom C,D,E,F

**CRE at the Crossroads:  
Market Shifts and Risk Implications**

**Jesse Gundersheim**, *Sr. Director, Market Analytics, CoStar Group*  
**Jeff Galus**, *Senior Manager, Crowe LLP*

**10:30 AM - 11:00 AM**

Royal Ballroom C,D,E,F

**Morning Break & Vendor Networking**

**11:00 AM - 12:00 PM**

Royal Ballroom C,D,E,F

**Peer Networking**  
*(Bankers & Fintech Members Only)*

**12:00 PM - 1:15 PM**

Royal Ballroom C,D,E,F

**Lunch & Vendor Networking**

**1:15 PM - 2:00 PM**

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**Generate More Profit, Win More Business and  
Add Discipline and Consistency to Your Loan  
Pricing Process**  
**Dan Roderick**, *CEO, Strunk, LLC*

**2:00 PM - 2:45 PM**

Royal Ballroom C,D,E,F

**The Retreat of the CFPB: What Are Banking  
Agencies Doing, and Are States Filling the Gap?**  
**Michael Flynn**, *Of Counsel, Buchalter*

**2:45 PM - 3:15 PM**

Royal Ballroom C,D,E,F

**Afternoon Break**

WEDNESDAY | OCTOBER 8TH

**3:15 PM - 4:15 PM**

Royal Ballroom C,D,E,F

**Beyond the Hype: What AI Means for Lenders**

**Kirk Briden**, *Founder & CEO, Banker's Caddy*

**Marc Billanti**, *Chief Sales Officer, JUDI.AI*

**Pranjal Daga**, *Co-Founder & CEO, Accend*

**Moderated by: Hitesh Bajaria**, *Regional VP, Business Development & Relationship Manager, TASI Bank*

**5:30 PM - 7:30 PM**

Splitsville Luxury Lanes  
in Downtown Disney

**Bowling, Billiards, Darts... Oh My!**

Join us for a casual reception featuring beverages and refreshments while enjoying some fun and games!

**Please meet in the hotel lobby at 5:00PM.**

**Conference Concludes**

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