

COLLABORATE TO INNOVATE – AGENDA

September 30, 2019

TIME	SESSION
12:00 pm	Registration Opens
1:00 – 5:00 pm	Community Engagement Activities Activities include stuffing backpacks with school supplies and a visit to an after-school program for an Hour of Code with the children.
6:00 – 8:00 pm	Welcome Reception

October 1, 2019

TIME	SESSION
7:30 – 8:30 am	Breakfast
8:30 – 8:45 am	Welcome to Finastra Universe
8:45 – 9:05 am	The Virtuous Cycle of Community Markets Mike Dionne , Senior Vice President, Community Markets, Finastra
9:05 – 9:45 am	The Future of Finance is Open: Taking Community Markets to the Next Level Eric Duffaut , President, Finastra
9:45 – 10:15 am	Platform Reality: Transforming with Agility and Speed <ul style="list-style-type: none">• The forces of change in financial services• An ecosystem for collaboration• New models of opportunity with Platform Eli Rosner , Chief Product & Technology Officer, Finastra
10:15 – 10:45 am	Networking and Refreshment Break Sponsor Expo
10:45 – 11:15 am	The Bank of the Future [Panel] Technology is an agent of change and a catalyst for innovation and collaboration. Beyond technology, how do banks tackle other challenges such as changing demographics, internal culture and the many forays in banking made by retailers in recent years?

TIME	SESSION
11:15 – 11:35 pm	<p>Digital Banking Anywhere</p> <ul style="list-style-type: none"> • The need for "now" (real-time money movement, faster innovation, etc.) • Engaging the community through digital • Tailoring experiences for specific needs <p>Allan Brown, General Manager, Digital, Finastra Jim Vasquez, Vice President, Finastra</p>
11:35 am – 12:00 pm	<p>Digital Banking of the Future [Panel]</p> <ul style="list-style-type: none"> • Explore emerging trends (real-time, open banking, new innovations) • Using Digital to build long-term relationships <p>*What is the new normal?</p>
12:00 – 12:20 pm	<p>Retail Banking: The Tech Culture Within</p> <ul style="list-style-type: none"> • Technology and the employee experience • How functionalities like workflows fit into the employee productivity • How will the banker of tomorrow think, act and use technology? <p>Troy Land, General Manager, Retail, Finastra Mike Hatch, Managing Director, Finastra</p>
12:20 – 12:45 pm	<p>The Banker of Tomorrow [Panel]</p> <ul style="list-style-type: none"> • What are students learning? • What innovation is coming out and could be the next trend? • How are they differentiating from what is done now?
12:45 – 2:00 pm	<p>Networking and Lunch Break Sponsor Expo</p>

TIME	SESSION
2:00 – 2:20 pm	<p>Mortgage: Winning with Local Advantage</p> <ul style="list-style-type: none"> • Borrowers are looking for a blend of local values and digital access • Community engagement practices to reinforce brand and mortgage position • Future of digital mortgage <p>Steve Hoke, General Manager, Mortgage, Finastra Dan Putney, Managing Director, Finastra</p>
2:20 – 2:45 pm	<p>Mortgage: Winning with Local Advantage [Panel]</p> <ul style="list-style-type: none"> • What types of community engagement efforts are the most impactful for community institutions? • How have millennial borrowers changed the digital strategy of mortgage lending?
2:45 – 3:05 pm	<p>Lending and Compliance: What's Next</p> <ul style="list-style-type: none"> • Trends on digital vs traditional commercial lending • Compliance pitfalls of digital lending • Upcoming regulatory impacts <p>Mitch Lucas, General Manager, Consumer Lending & Compliance, Finastra Jill Lockwood, Director, Finastra</p>
3:05 – 3:30 pm	<p>Lending and Compliance: What's Next [Panel]</p> <ul style="list-style-type: none"> • How do you see clients responding to digital trends? • How have digital capabilities challenged compliance teams? • How do regulatory changes effect borrowers?
3:30 – 4:00 pm	<p>Networking and Refreshment Break Sponsor Expo</p>
4:00 – 4:45 pm	<p>Appathon Showcase: The Grand Final</p>
4:45 – 5:30 pm	<p>Keynote Session: Jason Henrichs, Managing Director, Fintech Forge</p>
5:30 – 7:30 pm	<p>Finastra Universe Cocktail Reception</p>

October 2, 2019

TIME	SESSION
7:30 – 8:30 am	Breakfast
8:30 – 8:40 am	Welcome Back
8:40 – 9:10 am	Our Vision for Community Markets Vincent Pugliese , Senior Vice President, Product Management, Community Markets, Finastra Mike Dionne , Senior Vice President, Community Markets, Finastra
9:10 – 9:40 am	What the Market Says [Panel]
9:40 – 10:00 am	Networking and Refreshment Break Sponsor Expo
10:00 – 10:30 am	Smart Innovation – Collaborate to Innovate <ul style="list-style-type: none">• Platformification in Community Markets• Exploring the platform approach for greater collaboration• Examination of real-world customer use-cases John Weinkowitz , Head of Strategy, Finastra
10:30 – 11:00 am	Keynote Session: Tony Surma , Chief Architect, Microsoft
11:00 – 11:05 am	Room Change

TIME	SESSION				
11:05 am – 12:35 pm	Open Forum				
	Room 1	Room 2	Room 3	Room 4	Room 5
11:05 – 11:45 am	Privacy Laws	User Experience	Core vs. Digital: The Open Banking Smackdown	Stress-free Compliance	Open Platform 101
11:45 – 11:50 am	Room Change				
11:50 am – 12:35 pm	Privacy Laws [Repeat]	User Experience [Repeat]	Core vs. Digital: The Open Banking Smackdown [Repeat]	Stress-free Compliance [Repeat]	Open Platform 101
12:35 – 1:45 pm	Networking and Lunch Break Sponsor Expo				
1:45 – 3:10 pm	Open Forum				
	Room 1	Room 2	Room 3	Room 4	Room 5
1:45 – 2:25 pm	Digital Engagement in Lending	Big Data and Analytics	Business Banking Anywhere	Riding the Digital Wave	Open Platform 101
2:25 – 2:30 pm	Room Change				
2:30 – 3:10 pm	Digital Engagement in Lending [Repeat]	Big Data and Analytics [Repeat]	Business Banking Anywhere [Repeat]	Riding the Digital Wave [Repeat]	Open Platform 101