



# COLLABORATE TO INNOVATE – AGENDA

September 30, 2019

TIME	SESSION
12:00 pm	<b>Registration Opens</b>
1:00 – 5:00 pm	<b>Community Engagement Activities</b> Activities include stuffing backpacks with school supplies and a visit to an after-school program for an Hour of Code with the children.  Honore Room, Hilton Palmer House
4:00 – 6:00 pm	<b>Chicago Fintech Meetup *By Invitation Only*</b>
6:00 – 8:00 pm	<b>Welcome Reception</b> <b>Empire Ballroom, Hilton Palmer House</b>



**October 1, 2019**  
 Grand Ballroom, Hilton Palmer House

TIME	SESSION
7:30 – 8:40 am	<b>Breakfast</b>
8:40 – 8:50 am	<b>Welcome to Finastra Universe</b>  <b>Johanna Pugh</b> , VP, Global Services Sales, Finastra <b>Arno Castanet</b> , Director, Marketing, Finastra
8:50 – 9:10 am	<b>The Virtuous Cycle of Community Markets</b>  <b>Mike Dionne</b> , SVP, Community Markets, Finastra
9:10 – 9:40 am	<b>Putting Innovation into the Hands of Community Banks and Credit Unions</b>  <b>Eric Duffaut</b> , President, Finastra
9:40 – 10:10 am	<b>Platform Reality: Transforming with Agility and Speed</b> <ul style="list-style-type: none"> <li>• The forces of change in financial services</li> <li>• An ecosystem for collaboration</li> <li>• New models of opportunity with Platform</li> </ul> <b>Eli Rosner</b> , Chief Product & Technology Officer, Finastra
10:10 – 10:40 am	<b>Networking and Refreshment Break   Sponsor Expo</b>



TIME	SESSION
10:40 – 11:15 am	<p><b>The Bank of the Future [PANEL]</b></p> <ul style="list-style-type: none"> <li>- What will the bank of the future look like?</li> <li>- What key challenges to overcome in order to get there?</li> <li>- How can banks and credit unions better collaborate with FinTechs?</li> </ul> <p><b>Mike Meadows</b>, Director, UX Engineering, Finastra  <b>Martin Hearing</b>, Chief Marketing Officer, Finastra  <b>Tony Surma</b>, Chief Architect, Microsoft  <b>Gregg Hammerman</b>, CEO, Larky  <b>Sondra, McCorquodale</b>, Chief Digital Officer, Southern Bank  <b>Lucy Donaldson</b>, VP, Digital Innovation, Canvas Credit Union</p>
11:15 – 11: 35 pm	<p><b>Digital Banking Anywhere</b></p> <ul style="list-style-type: none"> <li>• The need for "now" (real-time money movement, faster innovation, etc.)</li> <li>• Engaging the community through digital</li> <li>• Tailoring experiences for specific needs</li> </ul> <p><b>Allan Brown</b>, General Manager, Digital, Finastra  <b>Cindy Bladow</b>, Managing Director, Finastra</p>
11:35 am – 12:00 pm	<p><b>Digital Banking of the Future [PANEL]</b></p> <ul style="list-style-type: none"> <li>• Explore emerging trends (real-time, open banking, new innovations)</li> <li>• Using Digital to build long-term relationships</li> <li>• What is the new normal?</li> </ul> <p><b>Caitlin O'Connor</b>, Solution Marketing Lead, Finastra  <b>Allan Brown</b>, General Manager, Finastra  <b>Kelli Schultz</b>, President, Allied Payment Network  <b>Tom Shen</b>, FinTech Advisor  <b>Todd Purcell</b>, SVP, Digital Banking, Marketing and Experience, Webster Bank</p>



TIME	SESSION
12:00 – 12:20 pm	<p><b>Retail Banking: The Tech Culture Within</b></p> <ul style="list-style-type: none"> <li>• Technology and the employee experience</li> <li>• How functionalities like workflows fit into the employee productivity</li> <li>• How will the banker of tomorrow think, act and use technology?</li> </ul> <p><b>Troy Land</b>, General Manager, Retail, Finastra  <b>Mike Hatch</b>, Managing Director, Finastra</p>
12:20 – 12:45 pm	<p><b>The Banker of Tomorrow [PANEL]</b></p> <ul style="list-style-type: none"> <li>• What are students learning?</li> <li>• What innovation is coming out and could be the next trend?</li> <li>• How are they differentiating from what is done now?</li> </ul> <p><b>Michele Yurcich</b>, Solution Marketing Lead, Finastra  <b>Troy Land</b>, General Manager, Retail, Finastra  <b>Mike Hatch</b>, Managing Director, Finastra  <b>Sam Kilmer</b>, Senior Director, Cornerstone Advisors  <b>Bob Dye</b>, Retail Banking Section Leader, Graduate School of Banking at the University of Wisconsin</p>
12:45 – 2:00 pm	<p><b>Networking and Lunch Break   Sponsor Expo</b></p>



TIME	SESSION
2:00 – 2:20 pm	<p><b>Mortgage: Winning with a Home Field Advantage</b></p> <ul style="list-style-type: none"> <li>• Borrowers are looking for a blend of local values and digital access</li> <li>• Community engagement practices to reinforce brand and mortgage position</li> <li>• Future of digital mortgage</li> </ul> <p><b>Steve Hoke</b>, General Manager, Mortgage, Finastra  <b>Dan Putney</b>, Managing Director, Finastra</p>
2:20 – 2:45 pm	<p><b>Mortgage: Winning with a Home Field Advantage [PANEL]</b></p> <ul style="list-style-type: none"> <li>• What kind of digital interactions are borrowers most requesting?</li> <li>• What community relationships are the most important for building a brand as a home lender?</li> <li>• How will new mortgage lending technologies strengthen business strategies?</li> </ul> <p><b>Brandi Meredith</b>, Solution Marketing Lead, Finastra  <b>Dan Putney</b>, Managing Director, Finastra  <b>Kathy Klahn</b>, SVP, Real Estate Manager, Clinton National Bank  <b>David Lykken</b>, Founder and Chief Transformational Officer, Transformational Mortgage Solutions  <b>Glenn Fitzgerald</b>, Sales Director, Factual Data</p>
2:45 – 3:05 pm	<p><b>Lending and Compliance: What's Next</b></p> <ul style="list-style-type: none"> <li>• Trends on digital vs traditional commercial lending</li> <li>• Compliance pitfalls of digital lending</li> <li>• Upcoming regulatory impacts</li> </ul> <p><b>Mitch Lucas</b>, General Manager, Consumer Lending &amp; Compliance, Finastra  <b>Jill Lockwood</b>, Director, Finastra</p>



TIME	SESSION
3:05 – 3:30 pm	<p><b>Lending and Compliance: What's Next [PANEL]</b></p> <ul style="list-style-type: none"> <li>• How do you see clients responding to digital trends?</li> <li>• How have digital capabilities challenged compliance teams?</li> <li>• How do regulatory changes effect borrowers?</li> </ul> <p><b>Brandi Meredith</b>, Solution Marketing Lead, Finastra  <b>Jill Lockwood</b>, Director, Finastra  <b>Mitch Lucas</b>, General Manager, Consumer Lending &amp; Compliance, Finastra  <b>Jeff Grobaski</b>, CEO, Epic River  <b>Bryan Wilken</b>, COO/ CIO, Bank Midwest</p>
3:30 – 4:00 pm	<p><b>Networking and Refreshment Break   Sponsor Expo</b></p>
4:00 – 4:45 pm	<p><b>Appathon Showcase: The Grand Final</b></p> <p><b>Nicola Young</b>, Solution Marketing Lead, Finastra</p> <p><b>JUDGES:</b></p> <ul style="list-style-type: none"> <li>• <b>Jeanette Kescenovitz</b>, Senior Director, Finastra</li> <li>• <b>Mark Nelson</b>, EVP, CIO/ COO, Horicon Bank</li> <li>• <b>Scott Ramon</b>, CTO, nbkc</li> <li>• <b>David Unsworth</b>, Partner, Information Venture Partners</li> </ul>



TIME	SESSION
4:45 – 5:30 pm	<p><b>Keynote Session: The Fast Follower Fallacy</b></p> <p>Is your strategy to be a fast follower, drafting on investments made by larger or more innovative firms? Innovation is a muscle that is built over time, not a strategy or product that can be copied. Organizational agility, innovation as a core operating principle and nimble architecture cannot be acquired overnight.</p> <p>Find out more about the forces reshaping financial services and the steps that needs to be taken today to keep up in the future.</p> <p><b>Jason Henrichs</b>, Managing Director, Fintech Forge</p>
5:30 – 7:30 pm	<p><b>Finastra Universe Cocktail Reception</b> Red Lacquer Room, Hilton Palmer House</p>



**October 2, 2019**

Grand Ballroom, Hilton Palmer House

TIME	SESSION
7:30 – 8:30 am	<b>Breakfast</b>
8:30 – 8:40 am	<b>Welcome Back</b>  <b>Johanna Pugh</b> , VP, Global Services Sales, Finastra <b>Arno Castanet</b> , Director, Marketing, Finastra
8:40 – 9:10 am	<b>Our Vision for Community Markets</b>  <b>Vincent Pugliese</b> , SVP, Product Management, Finastra <b>Mike Dionne</b> , SVP, Community Markets, Finastra
9:10 – 9:40 am	<b>What the Market Says [PANEL]</b>  <ul style="list-style-type: none"> <li>• Ideas for winning against the big banks</li> <li>• Building a culture that makes a difference</li> <li>• Becoming a leader by engaging in technology opportunities early</li> </ul> <b>Debbie Bianucci</b> , President and CEO, BAI <b>Carla Bienz</b> , President and CEO, Partners First Credit Union <b>Mark Nelson</b> , EVP, CIO/ COO, Horicon Bank <b>Sam Bitar</b> , VP, Business Systems, Webster5 Bank <b>Mike Dionne</b> , SVP, Community Markets, Finastra
9:40 – 10:00 am	<b>Networking and Refreshment Break   Sponsor Expo</b>





TIME	SESSION
10:00 – 10:30 am	<p><b>Smart Innovation – Collaborate to Innovate</b></p> <ul style="list-style-type: none"> <li>• Platformification in Community Markets</li> <li>• Exploring the platform approach for greater collaboration</li> <li>• A look at real-world customer use-cases</li> </ul> <p><b>John Weinkowitz</b>, Head of Strategy, Community Markets, Finastra  <b>Donna Simpson</b>, Chief Operating Officer, CertifiedFed  <b>Kelli Schultz</b>, President, Allied Payment Network  <b>Vincent Pugliese</b>, GM, Community Markets, Finastra</p>
10:30 – 11:00 am	<p><b>The Rise of Data, AI and ML [KEYNOTE]</b></p> <ul style="list-style-type: none"> <li>• What are Big Data, Artificial Intelligence (AI) and Machine Learning (ML)?</li> <li>• How you should think of them?</li> <li>• What does success with them look like?</li> </ul> <p><b>Tony Surma</b>, Chief Architect, Microsoft</p>
11:00 – 11:10 am	<b>Room Change</b>



TIME	SESSION
11:10am – 11:50 pm	Open Forum
11:10 – 11:50 am	Room 1   Salon 1
	<p><b>Real Time vs Real Life: Changing Payment Dynamics</b></p> <ul style="list-style-type: none"> <li>• Comparing and contrasting P2Psystems</li> <li>• How real time payments and FedNow may affect payment dynamics</li> <li>• Developing strategies to address emerging payments trends</li> </ul> <p><b>Michelle Bateman</b>, Director, Finastra</p>
11:10 – 11:50 am	Room 2   Salon 2
	<p><b>Elevation of the User</b></p> <ul style="list-style-type: none"> <li>• Transforming solutions into modern &amp; intuitive user experiences</li> <li>• Driving efficiency in the repetitive tasks</li> <li>• How focusing on Users will transform banking engagements</li> </ul> <p><b>Mike Meadows</b>, Director, UX Engineering, Finastra</p>



TIME	SESSION
11:10 – 11:50 am	<b>Room 3   Salon 3</b>
	<p><b>Core vs. Digital: The Open Banking Smackdown</b></p> <ul style="list-style-type: none"> <li>• Why open banking is necessary for digital or core</li> <li>• How core and digital embrace banking in the future</li> <li>• What are open APIs and open access, and why is it important?</li> </ul> <p><b>Troy Land</b>, General Manager, Retail, Finastra  <b>Allan Brown</b>, General Manager, Digital, Finastra</p>
11:10 – 11:50 am	<b>Room 4   Salon 6</b>
	<p><b>CECL: Why Lending Will Never be the Same</b></p> <ul style="list-style-type: none"> <li>• What is CECL and where did it come from?</li> <li>• How will CECL effect your financial organization and how should you prepare</li> </ul> <p><b>John Beckwith</b>, Managing Director, GreenPoint Global  <b>Vincent Ferret</b>, Principal Solution Consultant, Finastra</p>
11:10 – 11:50 am	<b>Room 5   Salon 5</b>
	<p><b>Open Platform 101 - with Active.AI [INTERVIEW]</b></p> <p>Learn how your institution can accelerate innovation with FusionFabric.cloud          Interview with Active.AI: conversational banking powered by artificial intelligence</p> <p><b>Sadiq Javeri</b>, Senior Director, Strategy, Finastra  <b>Madhav Mehra</b>, Vice President, Active.AI</p>



TIME	SESSION
11:50 – 11:55 am	<b>Room Change</b>
11:55 am – 12:35 pm	<b>Open Forum</b>
11:55 am – 12:35 pm	<b>Room 1   Salon 1</b>
	<p><b>Real Time vs Real Life: Changing Payment Dynamics [REPEAT]</b></p> <ul style="list-style-type: none"> <li>• Comparing and contrasting P2P systems</li> <li>• How real time payments and FedNow may affect payment dynamics</li> <li>• Developing strategies to address emerging payments trends</li> </ul> <p><b>Michelle Bateman</b>, Director, Finastra</p>
11:55 am – 12:35 pm	<b>Room 2   Salon 2</b>
	<p><b>Elevation of the User [REPEAT]</b></p> <ul style="list-style-type: none"> <li>• Transforming solutions into modern &amp; intuitive user experiences</li> <li>• Driving efficiency in the repetitive tasks</li> <li>• How focusing on Users will transform banking engagements</li> </ul> <p><b>Mike Meadows</b>, Director, UX Engineering, Finastra</p>



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11:55 am – 12:35 pm	<b>Room 5   Salon 5</b>
	<p><b>Open Platform 101 - with Monotto [INTERVIEW]</b></p> <ul style="list-style-type: none"> <li>• Learn how your institution can accelerate innovation with FusionFabric.cloud</li> <li>• Interview with Monotto: automated savings informed by artificial intelligence and machine learning.</li> </ul> <p><b>Sadiq Javeri</b>, Senior Director, Strategy, Finastra  <b>Christian Ruppe</b>, CEO &amp; Co-founder, Monotto</p>



TIME	SESSION
12:35 – 1:45 pm	<b>Networking and Lunch Break   Sponsor Expo</b>
1:45 – 2:35 pm	<b>Open Forum</b>
1:45 – 2:25 pm	<b>Room 1   Salon 1</b>
	<p><b>Stress-free Compliance</b></p> <ul style="list-style-type: none"> <li>• Common causes of compliance stress</li> <li>• Symptoms of compliance stress</li> <li>• Compliance stress management solutions to help ease the regulatory burden</li> </ul> <p><b>Mitch Lucas</b>, General Manager, Consumer Lending &amp; Compliance, Finastra</p>
1:45 – 2:25 pm	<b>Room 2   Salon 2</b>
	<p><b>Making Cents of Big Data</b></p> <ul style="list-style-type: none"> <li>• Consumer benefits of Big Data in the financial services industry</li> <li>• Impacts in Mortgage lending</li> <li>• Accessing borrower data and benchmarking tools</li> </ul> <p><b>Steve Hoke</b>, General Manager, Mortgage, Finastra</p>



TIME	SESSION
1:45 – 2:25 pm	<b>Room 3   Salon 3</b>
	<p><b>Successfully Converting Business Banking</b></p> <ul style="list-style-type: none"> <li>• How to formulate a Business Banking strategy</li> <li>• Maximizing impact to customers' operations</li> <li>• Preparing staff for excellence</li> </ul> <p><b>Michael Abare</b>, Principal Product Manager, Finastra</p>
1:45 – 2:25 pm	<b>Room 4   Salon 6</b>
	<p><b>Riding the Digital Wave</b></p> <ul style="list-style-type: none"> <li>• Where is the disruption?</li> <li>• Where does the community bank or credit union fit in within this disruption?</li> <li>• What is the most effective way to engage your customers and members?</li> </ul> <p><b>John Weinkowitz</b>, Head of Strategy, Community Markets, Finastra</p>
1:45 – 2:25 pm	<b>Room 5   Salon 5</b>
	<p><b>Open Platform 101 - with RoamHR [INTERVIEW]</b></p> <ul style="list-style-type: none"> <li>• Learn how your institution can accelerate innovation with FusionFabric.cloud</li> <li>• Interview with RoamHR: tax and accounting app for the gig economy</li> </ul> <p><b>Sadiq Javeri</b>, Senior Director, Strategy, Finastra  <b>Rick Gonzalez</b>, CEO &amp; Founder, RoamHR</p>



TIME	SESSION
2:25 – 2:30 pm	<b>Room Change</b>
2:30 – 3:10 pm	<b>Open Forum</b>
2:30 – 3:10 pm	<b>Room 1   Salon 1</b>
	<p><b>Stress-free Compliance [REPEAT]</b></p> <ul style="list-style-type: none"> <li>• Common causes of compliance stress</li> <li>• Symptoms of compliance stress</li> <li>• Compliance stress management solutions to help ease the regulatory burden</li> </ul> <p><b>Mitch Lucas</b>, General Manager, Consumer Lending &amp; Compliance, Finastra</p>
2:30 – 3:10 pm	<b>Room 2   Salon 2</b>
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2:30 – 3:10 pm	<b>Room 5   Salon 5</b>
	<p><b>Open Platform 101 - with Allied Payment Services [INTERVIEW]</b></p> <ul style="list-style-type: none"> <li>• Learn how your institution can accelerate innovation with FusionFabric.cloud</li> <li>• Interview with Allied Payment Services: real-time billing straight from your digital banking</li> </ul> <p><b>Sadiq Javeri</b>, Senior Director, Strategy, Finastra  <b>Ralph Marcuccilli</b>, Founder &amp; CEO, Allied Payment Network</p>