

Finastra Universe

Accelerating through change

Streaming **100+ Sessions**

March 2 - April 2



Agenda | Americas | March 2

PT	Pacific Time
CT	Central Time
ET	Eastern Time

PT	CT	ET	Keynotes
9:00am	11:00am	12:00pm	Accelerating through change: Rebuilding for better outcomes in a post-COVID world Simon Paris, CEO of Finastra is joined by Toni Townes-Whitley, President, US Regulated Industries, Microsoft, to discuss market challenges and the after COVID (AC) effect. How can we build a better future? Speakers: Simon Paris, CEO, Finastra Toni Townes-Whitley, President, US Regulated Industries, Microsoft
9:30am	11:30am	12:30pm	The role of technology in accelerating through change Accelerating through change with technology, transforming to a new open world Speakers: Eli Rosner, Chief Product and Technology Officer, Finastra
10:00am	12:00pm	1:00pm	Accelerating through change - technology as a catalyst for open innovation Eric Duffaut, President and Global Head of Customer Operations moderates a panel of renowned technology innovators and thought leaders as they discuss the evolution of trends and behaviors triggered by the pandemic, how technology has ignited innovation to accelerate through change, and their views on the future of financial services Speakers: Eric Duffaut, President and Global Head of Customer Operations, Finastra Sang Lee, Co-Founder and Managing Partner, Aite Group Claire Calmejane, Chief Innovation Officer, Societe Generale John Blizzard, President & CEO, Seattle Bank
11:15am	1:15pm	2:15pm	Accelerating through change in the Americas Change enables evolution, growth, and innovation. As existing digital transformation delivers end to-end efficiency that customers demand we continue to collaborate in ways that paves the path for tremendous change in how our customers do business. Learn how Finastra has championed this change with our customers. Speakers: Chris Zingo, SVP and General Manager of Americas Field Operations Sales, Finastra Noor Menai, CEO, CTBC Bank USA Christian Ruppe, Head of Innovation, Horicon Bank Shuki Licht, Chief Innovation Officer, Finastra Kim Prado, Global Head of Client, Banking & Digital Technology, RBC Capital Markets

Meet our Experts | Americas

Meet our Experts	LIVE - Tuesday, March 2, 2021, 3:30pm ET / 12:30pm PT
Payments in the cloud	
Expert: Mihail Duta, Principal, Solutions Consulting, Finastra	
Meet our Experts	LIVE - Tuesday, March 2, 2021, 3:30pm ET / 12:30pm PT
Bringing agility to your treasury with managed services	
Expert: Tracey Greeley, Solutions Leadership Principal, Finastra	
Meet our Experts	LIVE - Tuesday, March 2, 2021, 3:30pm ET / 12:30pm PT
Consumer lending in the new environment	
Experts: Jason Baldwin, Expert Business Consultant, Finastra Julia McIntosh, Senior Instructional Designer, Finastra	
Meet our Experts	LIVE - Tuesday, March 2, 2021, 3:30pm ET / 12:30pm PT
Next generation banking session	
Experts: Milind Pathak, Senior Director, Product Management, Core Banking Platform, Finastra John Weinkowitz, VP, GM Retail Core Banking, Americas, Finastra	
Meet our Experts	LIVE - Tuesday, March 2, 2021, 3:30pm ET / 12:30pm PT
How COVID has mandated a digital mortgage experience	
Experts: Patti Stoffel, Senior Manager, Functional Implementation, Finastra Laura Drebrickas, Senior Solutions Consultant, Mortgage, Finastra Jim Beran, Sales Executive, Finastra	

Meet our Experts	LIVE - Tuesday, March 2, 2021, 4:15pm ET / 1:15pm PT
Payments benchmarking	
Expert: Solomon Philip, Customer Value Lead, Finastra	
Meet our Experts	LIVE - Tuesday, March 2, 2021, 4:15pm ET / 1:15pm PT
Digital strategies for innovation	
Experts: Raul Ponce, Lead Product Manager, Finastra Angelica Gascon, Product Analyst Lead, Finastra	
Meet our Experts	LIVE - Tuesday, March 2, 2021, 4:15pm ET / 1:15pm PT
Leading the way with syndicated lending with digitization	
Experts: Sally Bixby, Lead Solutions Consultant, Finastra Aileen Mosier, Solutions Consulting Principal, Finastra Eyal Altaras, Director Solutions Consulting, Finastra Jason Boyer, Sales Enablement Manager, Complex Lending, Finastra	
Meet our Experts	LIVE - Tuesday, March 2, 2021, 4:15pm ET / 1:15pm PT
Future proofing and modernizing your commercial lending strategy	
Experts: Michele Lefler, Expert Business Consultant, Finastra Kate Curry, Business Consultant, Finastra Tom Kovach, Principal Business Consultant, Finastra Pam Fitz, Lead Solutions Consulting, Finastra	

Agenda | Americas

Payments	On-Demand
Moving the needle with B2B real time payments in 2021 <ul style="list-style-type: none">• Discuss the evolution of real-time payments and where we are heading• What are some of the real b2b use cases that are on the horizon• How can banks monetize these opportunities and drive the value proposition for real-time within their business Speakers: Keith Gray, VP, Strategic Partnerships, The Clearing House Christopher Ward, Executive Vice President, PNC Bank Robert Mancini, Head of US Payments, Finastra	
Using payment data to improve efficiencies and build revenue streams <ul style="list-style-type: none">• How are real time payments and ISO 20022 changing the face of data for banks• What technologies and strategies are needed for banks to leverage customer value from the data they hold• How can banks derive meaningful insights on the data they have available? Speakers: Peter Hazou, Director, Microsoft Heidi Mekjian, SVP, Strategic Partners Group, PNC Bank Prince Nasr Harfouche, Partner, Deloitte Robert Mancini, Head of US Payments, Finastra	

Payments	On-Demand
Payments in a post-COVID world and the journey to modernization <ul style="list-style-type: none">• What are the top digital initiatives that banks are prioritizing, what are the key enablers to their digital strategies, and how are they going about executing?• How can banks take advantage of new technologies like real time payments and the cloud Speaker: Adam Hoffman, EVP, Head of Treasury Solutions, Bank United Tim Mills, SVP, Emerging Payments, Regions Bank Sylvie Boucheron-Saunier, Managing Director, Payments, Americas, Finastra Michelle Bateman, Director, Payments, Finastra	
Powering up payments: How open banking and APIs can fast track your payment modernization <ul style="list-style-type: none">• What are the wider opportunities beyond 'account aggregation' for APIs• Discover how our platform can drive innovation for your payment systems• What are some of the use cases banks can build or partner with Speakers: Kiran AK, Principal Solutions, Payments, Finastra Sigal Druker, Director, Payments and Platforms, Finastra Lina Fabri, Director, Payments and Platforms, Finastra Rahul Chandra, Chief Business Officer, IN-D Eric Tran-Le, Vice President, Head of Actimize Premier, NICE Actimize	

Agenda | Americas

Corporate Banking	On-Demand
Changing the syndicated lending market with collaboration <ul style="list-style-type: none">• Learn how digitization can lead to change• See collaboration in action with Fusion LenderComm• What does the future look like for syndicated lending? Speakers: Helen Orton, Senior Principal Product Manager, Syndicated Lending, Finastra Patty Hines, Head of Corporate Banking, Celent	
Lending: Transforming loan servicing through consolidation <ul style="list-style-type: none">• Data aggregation transforming strategic decisions• Adapting to changing markets and regulation through consolidation• How technology is delivering innovation• The power of open Speakers: Dan Papagni, Director, Lending, Finastra Chris Papathanassi, Global Solution Lead, Lending, Finastra Maynard Ahner, Head of servicing technology, Commercial Lending & Banking Technology, Wells Fargo Bryan Burton, Commercial Banking Senior Manager, Technology, KeyBank	
It's the final countdown....to the end of LIBOR <ul style="list-style-type: none">• Forget system implementation, now it's time for business implementation• Stepping past the strategic to your tactical solution• Which LIBOR standard to follow – the global convergence• Loans vs Bonds; who's really driving the change?• How portfolios are being managed and key drivers Speakers: Rob Downs, Global Head of Corporate & Syndicated Lending, Finastra Pedro Porfirio, Global Head, Treasury & Capital Markets, Finastra Christine Scaffidi, Senior Director, Product Management, Lending, Finastra	

Corporate Banking	On-Demand
The power of an open ecosystem in lending <ul style="list-style-type: none">• Meet the Fintechs that are bringing innovation into your lending solutions• Learn how APIs can enable transformation and drive growth in your lending portfolios• Understand the benefits of adopting a collaborative model Speakers: Zane Dawson, Lead Solutions Consultant, Lending, Finastra Axel Coustere, Co-Founder, HUBX Antonio Garcia Romero, CEO, Fintep	
Corporate Banking: More accessible finance and adapting to global growth demands <ul style="list-style-type: none">• What is the next horizon for corporate banking?• The next step changes for corporate banking include accelerated digital adaptation• As economies grow, banks will need to prepare for growing transaction volumes• Processes will become cheaper and more widely available to smaller businesses Speakers: Enrico Camerinelli, Senior Analyst, Aite Group Carlos Teixeira, Senior Principal, Global Solutions Consulting, Finastra Tim Tyler, Principal Solutions Consultant, Finastra	
Accelerating corporate banking innovation with open platform <p>Based on the accelerated changes largely brought forward by the global pandemic, the priorities of banks across the world have shifted – from digital acceleration to value added services – join this session to understand how Finastra's open innovation platform, FusionFabric.cloud enables a world of collaboration and fast innovation across the Corporate Bank.</p> Speakers: Jonathan McPhail, Global Solution Lead, Finastra Tim Tyler, Principal Solutions Consultant, Finastra	

Agenda | Americas

Treasury & Capital Markets

On-Demand

Better risk and balance sheet optimization

- What your ALM process might be missing
- How to assess credit risk and its impact on balance sheet profitability and capital allocation
- Utilizing AI/Machine learning to model and predict accurately
- Subsequent actions that can be taken to optimize the balance sheet
- How to reduce impacts on level of provision by taking mitigation actions

Speakers:

Arnaud Picut, Global Head, Risk Practice, Finastra

Alla Gil, CEO, Straterix

Dr. Antti Korhonen, CEO, Detech Decision Technologies Ltd

Building a model treasury – using managed services to build an agile next-gen treasury solution

- The challenges treasurers have been facing that have led firms to work on a Treasury as a Service solution
- What gaps can managed services firms fill for treasurers?
- What are the benefits of Treasury as a Service for customers long term?

Speakers:

Denise Parker, SVP, Head of Global Partners & Ecosystems, Finastra

Michael Henssler, General Manager Treasury & Capital Markets, Finastra

Pradeep Vancheeswaran, Assistant Vice President, Business Development, HCL

Treasury & Capital Markets

On-Demand

LIBOR 360: Insights into the journey ahead and how to transition in the most optimal way

- Taking the temperature of how the industry is progressing
- The use and benefits of an index for risk-free rates in cash products
- Explore the true costs of LIBOR migration for financial institutions, across different lines of business
- Discover frameworks for forming budgets and optimal transition plans
- Learn how to deal with financial contracts if LIBOR ceases to be published

Speakers:

Pedro Porfirio, Global Head, Treasury & Capital Markets, Finastra

Isabelle Laurent, Deputy Treasurer and Head of Funding, EBRD

Chris Palmer, Head of LIBOR Transition, JP Morgan

Chris Papathanassi, Global Solution Lead, Lending, Finastra

Platformification in the new era of treasury & capital markets

- How to build a high-performance treasury workflow through an open platform ecosystem
- How platforms can enable innovation and rapid scalable development
- How use of a platform model is able to help overcome current business challenges

Speakers:

Pedro Porfirio, Global Head, Treasury & Capital Markets, Finastra

Arnaud Picut, Global Head of Risk Practice, Finastra

David White, Chief Commercial Officer, CloudMargin

Leonid Bogachev, Associate Professor, Probability, Department of Statistics, University of Leeds

Tim Rowlands, CEO, Vector Risk

Transformación Digital de la Banca

LIVE ON March 2, 2021, 3:30pm ET

Construyendo el banco de próxima generación (con Microsoft LATAM)

La banca está experimentando un cambio sistémico impulsado por las nuevas tecnologías y los cambios en el mercado. La disrupción está ocurriendo en toda la cadena de valor, desde la participación de los clientes hasta la incorporación, los préstamos, los pagos y la financiación alternativa.

Speakers:

Felipe Peñacoba Martínez, Enterprise Architect, Finastra
Fabio Mittelstaedt, Head of Financial Services Industry, Brazil & LATAM Microsoft
Sergio Corona, Head of Financial Services Industry, Hispanic LATAM Microsoft

Tesorería y Mercado de Capitales

LIVE ON March 2, 2021, 4:30pm ET

Construyendo un modelo de tesorería - aprenda como construir una Solución ágil de tesorería de próxima generación mediante el uso de servicios administrados

- Los desafíos a los que se han enfrentado los tesoreros han llevado a las empresas a trabajar en una solución de "Tesorería como Servicio"
- ¿Qué vacíos pueden llenar las empresas de servicios gestionados para los tesoreros?
- ¿Cuáles son los beneficios de "Tesorería como Servicio" para los clientes a largo plazo?

Speakers:

Marcelo Barrios, Head of Sales, LATAM, Finastra
Rafael Sainz, CEO, TCMpartners
Antonio Sierra, Founding Partner & Principal Consultant, TCMpartners
Alejandro Jaral, Senior Sales Executive, Treasury & Capital Markets, Finastra

Mortgage, Consumer and Small Business Lending

On-Demand

Riding the mortgage rollercoaster

- How will banks and credit unions manage the continued increase in mortgage volumes over H1 and into H2 2021?
- What efficiencies such as eClosings will banks and credit unions need to bring to customer's lending journeys?
- What will be key factors/deciders in homebuying decisions and how can banks adopt relevant changes to be the choice
- What's next for mortgage?

Speakers:

Steve Hoke, Vice President & General Manager, Mortgage & Lending solutions, Finastra
Dan Putney, Managing Director, Finastra
David Lykken, President & Founder, Transformational Mortgage Solutions
Leslie Parrish, Senior Analyst, Aite Group

Keeping the lights on for small business lending

- There has been tremendous stress and opportunity placed on small businesses in the US during the pandemic.
- What do you need to know about this segment to grow your loan and transaction portfolio?
- Which types of small businesses thrived, and which are struggling to survive?
- What impact has the stimulus had on them, their banking decisions and their plans.
- Join us to look at the data and how one bank is doing its best to make a difference and position itself for growth.

Speakers:

Jill Lockwood, Managing Director, Lending, Finastra
Mitch Lucas, Head of Lending Product & Compliance Management, Finastra
Noah Yosif, Assistant Vice President, Economic Policy & Research, ICBA
Kenneth Kelly, Chairman & CEO, First Independence Bank

Agenda | Americas

Mortgage, Consumer and Small Business Lending

On-Demand

What will a Biden-Harris administration look like for lending?

- A new administration. A new beginning
- How could these changes affect the lending market?
- Consumer Federal Protection Bureau and what that means for lenders
- Access to banking and what a fair-lending future looks like
- What's next for lending?

Speakers:

Mitch Lucas, Head of Lending Product & Compliance Management, Finastra
Joe Lynyak, Partner, Dorsey & Whitney

The power of an open ecosystem for lending transformation

- Using APIs to transform your business
- Adoption a platform strategy and the benefits it can bring
- How new developments are evolving what community banks and credit unions can do to drive digital transformation

Speakers:

Lucian Schmit, Senior Solutions Consultant, Lending, Finastra
Laura Drebrickas, Senior Solutions Consultant, Mortgage, Finastra

Retail and Digital Banking

On-Demand

Hello, next gen digital banking!

- The pace of change – new exciting outlook for community banks and credit unions?
- The rise of engagement: deeper digital connections
- The future: partnerships with fintechs will fuel Innovation and connected experiences
- FIs can accelerate their progress by working with reliable integration partners and quickly implementing cutting edge apps

Speakers:

John Weinkowitz, VP, GM Retail Core Banking, Americas, Finastra
Sapna Gulati, Senior Director, Product Management, Digital Community Markets, Finastra

Retail and Digital Banking

On-Demand

Drive business transformation with a cloud-based open core banking

- From legacy to Cloud in less than 5 days
- The acceleration to Cloud during the pandemic
- Cloud: the catalyst of changes - how Cloud is making a significant impact on retail banking
- Customer testimonials

Speakers:

Milind Pathak, Senior Director, Product Management, Core Banking Platform, Finastra
Mark Nelson, COO, Horicon Bank
Michael Bartkoski, COO, NBKC
David Koscheski, Director, US Financial Services Industry, Microsoft

Bespoke Banking: Customizing solutions your account holders need

- Digital banking must evolve to keep pace with market trends and to have the agility to respond to the unexpected
- Single platform and seamless digital experiences for consumers, businesses, and employees makes life so much easier
- Fintech partnerships are key to a successful future, fueling innovation through open banking

Speakers:

Raul Ponce, Lead Product Manager, Platform and Technology, Finastra
Mark Nelson, COO, Horicon Bank
Peter Berbee, VP, Product Management, Financial Services, Kore.ai

Banking-as-a-Service - APIs and the ecosystem world

- Delivering the future of financial services
- FusionFabric.cloud for retail solution – the power to innovate and enable faster innovation
- The rise of open banking
- Fintech in action – live demo from BankBI

Speakers:

John Weinkowitz, VP, GM Retail Core Banking, Americas, Finastra
Graham Goble, Founder & CEO, BankBI

Agenda | Americas

Canada	On-Demand
2020, technology and Canadian resilience A year like no other brought technology forward to bridge gaps and reveal new opportunities. Siobhan Byron, SVP, Technology Enabled Managed Service at Finastra and her guests discuss the many changes we had to deal with in 2020, the adoption and limits of new technology as well as Canadian resilience. Speakers: Siobhan Byron, SVP & Head of TEMS, Finastra Janet McCausland, Head of Programs, Prince's Trust Canada Kevin Purkiss, VP, Card Operations & Supplier Management, Royal Bank of Canada	
Filogix: Putting down some digital roots Join Ryan Spence, Principal, Broker Channel Development, Filogix, Muhammad Rashid, Director, Filogix Expert Pro, and guests to discuss the path to a digitized end-to-end mortgage process to enrich the consumer experience and open a new world of possibilities. Speakers: Ryan Spence, Principal, Broker Channel Development, Filogix Muhammad Rashid, Director, Business Development, Filogix Abbas Ali, Director, Expert Pro, Filogix	
Open for business: The Filogix mortgage marketplace Connecting consumers to brokers, lenders and many supporting partners to enable a secure mortgage application process, the Filogix mortgage marketplace continues to grow to provide more choice for brokers, and more efficient transactions for all. Richard Clark, VP of Filogix, and guests review the advantages of the marketplace and what it means to be truly open for business. Speakers: Richard Clark, Vice President, Filogix Sue Hutchison, President, Equifax Canada Chris Turcotte, President & COO, CENTUM Financial Group Ed Karthaus, EVP, Sales & Marketing, Home Trust Company	

Consultants	On-Demand
The blueprint for achievement: Global Services, implementations and conversions <ul style="list-style-type: none">• Overview of the Fusion Method program, which has made implementations and conversions more streamlined and timely• Understand how each part of the process flows into the next, and how efficiencies have grown• Hear about conversion and implementation experiences Speaker: Louise Lassen, Vice President, Community Markets Global Services, Finastra	
My experience with Fusion Phoenix: An executive's perspective What's it really like to be on Fusion Phoenix? In this discussion, two Fusion Phoenix clients discuss how being on the modern core has affected their business, the value of having open technology, and how Finastra has stepped in to create essential partnerships in order to ensure both leaders are able to keep business running and innovative. Speakers: John Weinkowitz, VP, GM Retail Core Banking, Americas, Finastra Keith Mansfield, EVP, Chief Operations Officer, b1Bank Josh Cook, President & CEO, Community Choice Credit Union	
Making financial institutions successful: A consultant's point of view For consultants, keeping abreast of trends, needs, and wants is vital for business. Hear first-hand experience and accounts of lessons learned from North America Community Markets Consultants. <ul style="list-style-type: none">• The chicken or the egg: is technology or service most prevalent in decision-making and why?• What can consultants and fintechs do to help small and mid-sized banks and credit unions that feel left out of the technology revolution?• What band-aid approaches have you seen fail and your advice to financial institutions when faced with such dilemma? Speakers: Puja Agrawal, COO, Americas, Finastra Loretta Weller-Mowers, Senior Strategic Consultant, CU Engage Mark Shaw, Managing Director, Crowe Nirav Doshi, CEO, CDP George McGourty, Partner, Arriba Advisors	

Agenda | Americas

Partners (exclusive session)	On-Demand
Scaling for joint success <p>This partner-exclusive session will provide a concise overview for valued members of our partner ecosystem. Join us to learn more about:</p> <ul style="list-style-type: none">• The journey of the support and enablement programs available to create joint business with Finastra• How to expand your business motions, digital investments and enablement, all aimed at supporting our partnership in scaling for joint success• Moving into new geos or business lines• Gaining maturity with the comprehensive program we have put together specifically for our valued partners <p>Speakers: Denise Parker, SVP, Head of Global Partners & Ecosystems, Finastra Edward Sweigart, VP, Partners & Ecosystems, Finastra</p>	

Services	On-Demand
Finastra Managed Services - the foundation of great strategic partnerships <ul style="list-style-type: none">• Accenture and Finastra explore how managed services allow banks, partners and IT vendors to forge powerful partnerships and evolve together• The time for managed services is now - adapt, grow and achieve your long-term strategic goals <p>Speakers: Neil Budd, VP, Finastra Managed Services, Finastra Amber Dacres, Finastra Services Marketing, Finastra Charles Clinton, Finastra Partnership Director, Accenture Jay Krishnasany, Sales & Solution Architect, Accenture</p>	
Going beyond projects with high-value services <p>We're changing the face of Services and how we work to accelerate value for our customers. In this session, Chief Marketing Officer, Margaret Franco and our Executive Vice President of Finastra Services, Andrew Skehel explore High-value Services and how we're working harder to drive our customers' desired outcomes,</p> <p>Speakers: Andrew Skehel, Executive Vice President, Global Services, Finastra Margaret Franco, Chief Marketing Officer, Finastra</p>	

Agenda | Americas

Platform Overview	On-Demand
FusionFabric.cloud: The open platform for your innovation Welcome from Vincent Pugliese, SVP and General Manager, Platform. What’s in it for you when you join our platform ecosystem? Increased sales conversions, expanded market reach, faster time to go-live – sound good? Find out how FusionFabric.cloud can help you achieve these and more. Speaker: Vincent Pugliese, SVP & General Manager, Platform, Finastra	
Platform - Fintech	On-Demand
Discover our platform and use cases Speakers: Sudhanshu Kwatra, Lead Fintech Partner Manager, Finastra Nitin Iyer, Senior Principal, Solutions Consulting, Finastra	
Overview of our app validation process Speaker: Sudhanshu Kwatra, Lead Fintech Partner Manager, Finastra	
Overview of our platform commercial models Speaker: Sudhanshu Kwatra, Lead Fintech Partner Manager, Finastra	

Platform - Bank Developers	On-Demand
Find out how we leverage DevOps best practices to enable continuous delivery Speakers: Harbinder Kang, Senior Director, Development Operations, Products, Platform and Technology, Finastra Christophe Langlois, Global Fintech & Developer Ecosystem Marketing, Finastra	
Discover Finastra’s strategic focus on data and analytics Speakers: Adam Lieberman, Head of Artificial Intelligence & Machine Learning, Finastra Bram Leenhouders, Senior Director Research & Development, Finastra	
FusionFabric.cloud, a catalyst for innovation \The platform for bank developers Speakers: Chirine Ben Zaied, Head of Innovation, Finastra Pierre Quemard, Senior Management, GSC Platform & Innovation, Finastra	