

NORTHERN NEW ENGLAND CEO SUMMIT

JANUARY 30-31, 2025 | SHERATON PORTSMOUTH HARBORSIDE HOTEL, PORTSMOUTH, NH

AGENDA

JANUARY 30

12:00 PM **Welcome Luncheon and Opening**

1:30 PM ***Community Banking: Thriving in a Shifting Economic and Operating Environment***

Dave Thomas, EPG, Inc.

With an expectation of a changing interest rate environment coupled with uncertain operating challenges and opportunities, this presentation will frame and present a “blueprint” for thinking and action to meet these challenges and realize opportunities. Utilizing the framework of robust Asset and Liability management principles combined with key strategic planning methods, an approach to build a tactical level workplan for your community bank looking out over two years will be presented. Frameworks for building comprehensive understanding of the banks current position from both a quantitative and qualitative perspective will be shared and related methods for alignment of “stakeholders” and ALM “best practices” will be presented. Finally, a framework for creating a working plan supported by the ongoing ALM modeling discipline will be discussed and provided.

2:30 PM ***Attracting & Retaining Talent, Succession Planning, Culture***

Cameron Boyd, Smith & Wilkinson

This session will discuss the global and regional trends impacting talent acquisition and retention, the hallmarks of high-performance cultures, and how banks are effectively leveraging their Employee Value Proposition.

3:30 PM ***State Bankers Associations Executive Panel***

Chris D’Elia, Vermont Bankers Association

Kristy Merrill, New Hampshire Bankers Association

Jim Roche, Maine Bankers Association

Hear from the leaders of the three Northern New England state banking associations about pressing public policy matters affecting member banks, as well as the challenges and opportunities of running a trade association in today’s challenging environment.

5:00 PM **Reception**

6:00 PM **Dinner**

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AGENDA CONT.

JANUARY 31

7:00 AM **Breakfast**

8:30 AM ***Federal Reserve Update***

Miki Bowman, Federal Reserve Board

Miki Bowman was appointed by former President Trump in 2018 to serve on the Federal Reserve Board of Governors. She is the first person to fill the community bank seat on the board, a seat created by a 2015 law. Previously, Bowman was the Kansas banking commissioner. Bowman has made a practice of publicly diverging from the majority at the Fed Board over regulatory matters, with frequent and repeated calls for a lighter touch on banks. Over the past year she also emerged as one of the Fed's most hawkish voices on monetary policy, supporting a higher Fed policy rate for longer than most of her fellow central bankers to be sure to fully vanquish inflation.

9:30 AM ***Artificial Intelligence: Its Positive and Negative Impact on Risk, Policy, and Banking Operations***

John Rogers, Monarch Information Security Consulting

This session will discuss the present and future impact of AI in community banking. We'll review new cyber-attack vectors elements of cybersecurity risk and risk appetite policy to adequately control use AI's seamless integration in a growing number of technology systems and the general ethical and legal concerns for the origin of big data sets employed for specified business uses. Attendees will see examples of policy language and a view into what is likely to come in the near future.

10:45 AM ***Strategies to Protect Consumers from Fraud Threats***

Patrick Smith, ABA

Fraud against Americans is occurring at epidemic proportions. Internationally based crime syndicates are working overtime with domestic bad actors to target consumers of all ages and it's costing Americans billions of dollars each year. Criminals are using a multitude of tools in their arsenal to manipulate people and steal their hard-earned cash. Whether it's robocalls, texts, emails, social media, or bogus platforms, the goal is the same – and Americans are under assault. Join ABA's Patrick Smith for a discussion on the latest threats, from check fraud, phishing, credit card fraud to malware, and learn about actionable steps your bank can take to mitigate against the risks.

12:00 PM **Luncheon and Closing**