

BANK TECH SUMMIT

LIVE! BY LOEWS – ST. LOUIS • BALLPARK VILLAGE

MAY 1–3, 2023

PRESENTED BY

SAWYERS & JACOBS

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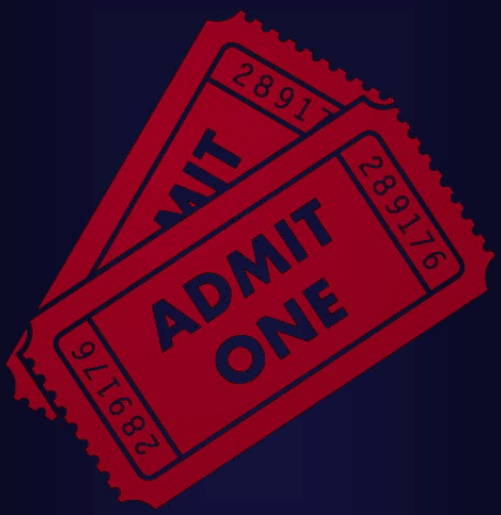
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A Winning Combo In the ❤ of St. Louis

Hope springs eternal this time of year … in business, banking, and baseball. A time of renewal and optimism for the future drives us all to plan and achieve, and the team at Sawyers & Jacobs has designed this year's Bank Tech Summit with exactly that winning combo in mind.

Two and a half days full of the latest ideas from the best and brightest in the banking industry are in store for you. And don't forget about what promises to be a fantastic evening of baseball as we all watch the 11-time World Series Champion St. Louis Cardinals take on the Angels from the exclusive and luxurious UMB Champions Club.



So … batter up, and get ready for a tech conference like no other as we learn, network, and have fun while winning cool tech and St. Louis-themed prizes!

AT-A-GLANCE AGENDA

***LOCATIONS TO NOTE:** All sessions will be in the Cardinals Ballroom (2nd Floor). All meals will be on the 2nd Floor Terrace (weather permitting). In the event of inclement weather, meals will be in Dugout and Jack Buck.*

MONDAY, MAY 1

Today's Beverage Stations Sponsored by FIS

8:00 AM–9:00 AM

Registration and Breakfast

Sponsored by Fiserv

9:00 AM–9:45 AM

Welcome and Introductions

Top Ten Tech Predictions:
Moving the Innovation Needle Forward

Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC

9:45 AM–9:50 AM

Tech Talk

9:50 AM–10:00 AM

Networking/Beverage Break

10:00 AM–10:45 AM

The Economy in 2023: Will the Banking Crisis Lead to a Pause on the Fed's War on Inflation?

Dr. Edmond J. Seifried, Co-Chairman Emeritus, Seifried & Brew LLC

10:45 AM–10:50 AM

Tech Talk

10:50 AM–11:00 AM

Networking/Beverage Break

11:00 AM–11:45 AM

The Human Factor in Bank Performance: Diversity, Discrimination, Decisions, and Direction

Mark M. Faircloth, Owner, Faircloth Performance Partners

11:45 AM–11:50 AM

Tech Talk

12:00 PM–1:00 PM

Lunch

1:00 PM–1:45 PM

Taking Your Digital Experience to New Heights

Kathleen Craig, Founder & CEO, Plinqit

1:45 PM–1:50 PM

Tech Talk

1:50 PM–2:00 PM

Networking/Beverage Break

2:00 PM–2:45 PM

Panel Discussion: Core Provider Trends

Greg Box, MidStates Sales Director, Jack Henry

Bob Ezell, Chief Customer Experience Officer, CSI

Brent Jenos, SVP, Bank Sales Segment Leader, Fiserv

Fiaz Sindhu, Head of Community Banking, FIS

2:45 PM–2:50 PM

Tech Talk

2:50 PM–3:00 PM

Networking/Beverage/Cookie Break

Sponsored by Journey Technology Solutions

3:00 PM–3:45 PM

Cybersecurity Threats in Banking

Joshua Jacobs, President, Sawyers & Jacobs LLC

3:45 PM–3:50 PM

Tech Talk

3:50 PM–4:00 PM

Closing Comments for Day 1 and Prizes

4:00 PM–6:00 PM

Reception at The Bullock

Sponsored by Five Iron, LLC

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REDWOLF CYBERSECURITY™ — Protect the Pack

REDCAPE TECH SUPPORT™ — Your Hero in Tech

AT-A-GLANCE AGENDA

***LOCATIONS TO NOTE:** All sessions will be in the Cardinals Ballroom (2nd Floor). All meals will be on the 2nd Floor Terrace (weather permitting). In the event of inclement weather, meals will be in Dugout and Jack Buck.*

TUESDAY, MAY 2

8:00 AM—9:00 AM

Breakfast and Ballroom/Exhibit Hall Opens

9:00 AM—9:45 AM

Bank Tech Past, Present, and Future: Where We've Been and Where We Need to Go to Survive

Trent Fleming, Founder, Trent Fleming Consulting

9:45 AM—9:50 AM

Tech Talk

9:50 AM—10:00 AM

Networking/Beverage Break

10:00 AM—10:45 AM

Taking Your Digital Marketing Strategy to the Next Level

Dante Barger, Founder, Original Dante Studio

Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC

10:45 AM—10:50 AM

Tech Talk

10:50 AM—11:00 AM

Networking/Beverage Break

11:00 AM—11:45 AM

Picking Your Battles: Tech Projects That Should Be on Your Radar

Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC

Joshua Jacobs, President, Sawyers & Jacobs LLC

11:45 AM—11:50 AM

Tech Talk

12:00 PM—1:00 PM

Lunch

Special Entertainment Provided by the Talented Student Musicians from Lift for Life Academy

1:00 PM—1:45 PM

Prayers, Praise, Perspectives, and Pontifications: Bankers Open Mic

1:45 PM—1:50 PM

Tech Talk

1:50 PM—2:00 PM

Networking/Beverage Break

2:00 PM—2:45 PM

Nailing the Fintech Integration Message

Eric Hazard, CEO, Vested Ventures

Greg Jass, CEO, Red Lab

2:45 PM—2:50 PM

Tech Talk

2:50 PM—3:00 PM

Networking/Beverage/Ballpark Snack Break

Sponsored by Federal Protection, Inc. and FIS

3:00 PM—3:45 PM

From Data Analytics to Artificial Intelligence: The End of Banking as We Know It?

Mark Blankespoor, Partner, Journey Technology Solutions

Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC

3:45 PM—3:50 PM

Tech Talk

3:50 PM—4:00 PM

Closing Comments for Day 2 and Prizes

6:45 PM

St. Louis Cardinals vs. Los Angeles Angels

UMB Champions Club, Busch Stadium

Gates Open 1 1/2 Hours Prior to Scheduled Game Time

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AT-A-GLANCE AGENDA

***LOCATIONS TO NOTE:** All sessions will be in the Cardinals Ballroom (2nd Floor). All meals will be on the 2nd Floor Terrace (weather permitting). In the event of inclement weather, meals will be in Dugout and Jack Buck.*

WEDNESDAY, MAY 3

8:00 AM–9:00 AM

Breakfast and Ballroom/Exhibit Hall Opens

Sponsored by Fiserv

9:00 AM–9:45 AM

The Thin Line Between Running and Ruining a Bank

Greyson E. Tuck, President, Gerrish Smith Tuck, PC

9:45 AM–9:50 AM

Tech Talk

9:50 AM–10:00 AM

Networking/Beverage Break

10:00 AM–10:45 AM

Twenty Strategic Tech Priorities Wrap-Up

Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC

Joshua Jacobs, President, Sawyers & Jacobs LLC

10:45 AM–10:50 AM

Tech Talk

10:50 AM–11:00 AM

Networking/Beverage Break

11:00 AM–11:45 AM

Keynote: Leading a Traditional and Successful Brand into the Future

Bill DeWitt III, President, St. Louis Cardinals

11:45 AM–11:50 AM

Tech Talk

11:50 AM –12:00 PM

Closing Comments for Day 3 and Prizes

Baseball Gift Table and Technology Gift Table Sponsored by FIS and Lewis Thomason, P.C.



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SESSION DETAILS

TOP TEN TECH PREDICTIONS: MOVING THE INNOVATION NEEDLE FORWARD

Monday, May 1st at 9:00 AM—9:45 AM

JIMMY SAWYERS, CHAIRMAN & CO-FOUNDER, SAWYERS & JACOBS LLC

An annual tradition, Jimmy leads off the conference and tees up his top tech predictions for your consideration.

Get the unvarnished truth on the latest trends in banking technology so you can map out your financial institution's tech strategy for the years ahead. From crypto bros to fintech FOMO, digital services innovation to artificial intelligence … let Jimmy help you navigate a path to success.

THE ECONOMY IN 2023: WILL THE BANKING CRISIS LEAD TO A PAUSE IN THE FED'S WAR ON INFLATION?

Monday, May 1st at 10:00 AM—10:45 AM

DR. EDMOND J. SEIFRIED, CO-CHAIRMAN EMERITUS, SEIFRIED & BREW LLC

As we pass the one-year anniversary of the Federal Reserve's battle against inflation, many are wondering what lies ahead. While interest rates have been driven upward in hopes of containing inflation, the recent banking crisis has many experts urging the Fed to suspend the rate hikes and wait until the crisis is resolved. Dr. Ed will provide his insight into this difficult question and shed light on the future of the U.S. economy, including the impact the economic environment may have on strategic technology spending decisions for financial institutions. It is clear that whatever decision is taken, it will surely have an impact on the nation for years to come.

THE HUMAN FACTOR IN BANK PERFORMANCE: DIVERSITY, DISCRIMINATION, DECISIONS, AND DIRECTION

Monday, May 1st at 11:00 AM—11:45 AM

MARK M. FAIRCLOTH, OWNER, FAIRCLOTH PERFORMANCE PARTNERS

Human interaction is the glue that holds the black, white, and sometimes grey elements of corporate performance together. In many cases, the concepts of acceptance and fair treatment have been watered down and even weakened by well-meaning but rigid rules.

In this engaging session, Mark outlines the avoidable forms of discrimination and "check the box" adherence to diversity rules. Then, using current banking examples, he introduces a path for managers and employees to follow in making bold—and correct—decisions designed to encourage inclusion and improved performance.

TAKING YOUR DIGITAL EXPERIENCE TO NEW HEIGHTS

Monday, May 1st at 1:00 PM—1:45 PM

KATHLEEN CRAIG, FOUNDER & CEO, PLINQIT

Digital… digital… digital…

This year digital transformation is on most CEOs' minds, but how can your financial institution make real digital transformation happen? How do you sift through the noise and shiny objects to create a meaningful digital-first approach for your current and future customers? In this session, we will delve into what digital transformation truly means, the latest trends in this facet of the banking industry, and the ways that you can create an excellent digital experience that will make your customers want to sing your praises from the mountaintops.

SESSION DETAILS

PANEL DISCUSSION: CORE PROVIDER TRENDS

Monday, May 1st at 2:00 PM—2:45 PM

GREG BOX, MIDSTATES SALES DIRECTOR, JACK HENRY

BOB EZELL, CHIEF CUSTOMER EXPERIENCE OFFICER, CSI

BRENT JENOS, SVP, BANK SALES SEGMENT LEADER, FISERV

FIAZ SINDHU, HEAD OF COMMUNITY BANKING, FIS

Show me your core, and I'll show you your financial institution's future!

Is your core a 40-year-old relic going the way of Bed Bath & Beyond? Or have you gambled on a new core based on the glowing reviews of industry trade publications and less-than-independent and objective consultants? How can core providers continue to increase revenues in a shrinking market of banks?

Join the leading core providers as they relate the latest core trends and how they are re-engineering their companies and services to meet the digital demands of today's consumers and financial institutions.

CYBERSECURITY THREATS IN BANKING

Monday, May 1st at 3:00 PM—3:45 PM

JOSHUA JACOBS, PRESIDENT & CO-FOUNDER, SAWYERS & JACOBS LLC

Staying ahead of the hackers! Joshua will discuss the evolution of a business email compromise (BEC) and the new methods your financial institution's adversaries are using to gain unauthorized access to your users' email accounts. He will also discuss why this is such a popular target and the dangers that a BEC attack presents to your financial institution.

He will demonstrate a live attack, employing a modern BEC scheme using a man-in-the-middle (MiTM) attack. See an attack unfold in real time and watch how the bad guys are able capture user credentials and even bypass multifactor authentication (MFA)!

BANK TECH PAST, PRESENT, AND FUTURE: WHERE WE'VE BEEN AND WHERE WE NEED TO GO TO SURVIVE

Tuesday, May 2nd at 9:00 AM—9:45 AM

TRENT FLEMING, FOUNDER, TRENT FLEMING CONSULTING

To understand the future of banking technology, it is important to understand the evolving role tech has played through the years. As an aging historian of bank data processing (just the term *data processing* screams "seasoned professional"), Fleming will offer a journey from start to future of how technology can be best leveraged to enhance the customer experience and improve productivity.

TAKING YOUR DIGITAL MARKETING STRATEGY TO THE NEXT LEVEL

Tuesday, May 2nd at 10:00 AM—10:45 AM

DANTE BARGER, FOUNDER, ORIGINAL DANTE STUDIO

JIMMY SAWYERS, CHAIRMAN & CO-FOUNDER, SAWYERS & JACOBS LLC

Just having a Facebook page doesn't cut it any longer if a financial institution wants to market effectively. A new generation of social media has created more marketing channels. Are you integrating digital media into your marketing strategies? Are you engaging your customers with personalized content?

Learn how your financial institution can increase its digital marketing ROI by serving up niche content and compelling stories designed to guarantee your brand gets noticed in a crowded field of financial services providers.

SESSION DETAILS

PICKING YOUR BATTLES: TECH PROJECTS THAT SHOULD BE ON YOUR RADAR

Tuesday, May 2nd at 11:00 AM—11:45 AM

JIMMY SAWYERS, CHAIRMAN & CO-FOUNDER, SAWYERS & JACOBS LLC

JOSHUA JACOBS, PRESIDENT & CO-FOUNDER, SAWYERS & JACOBS LLC

Strategy is not just about which opportunities one pursues … it's also about the opportunities one forgoes. With finite resources in a fast-paced industry, which technology projects are worth your time? Which tech is just cool and trendy and which has utility and a positive ROI?

Find out which tech innovations deserve your attention as Jimmy and Joshua pick apart the latest tech trends, keeping in mind the strategic business issues that need to be a top priority for financial institutions today and tomorrow.

PRAYERS, PRAISE, PERSPECTIVES, AND PONTIFICATIONS: BANKERS OPEN MIC

Tuesday, May 2nd at 1:00 PM—1:45 PM

FACILITATED BY JIMMY SAWYERS, CHAIRMAN & CO-FOUNDER, SAWYERS & JACOBS LLC

What's on your mind? It's your time to tap into the collective knowledge in the room and get answers to those questions one ponders on the daily commute to and from work! No questions are off limits. Ask anything! Share your experiences … both good and bad … with your peers. It's even okay to blow off a little steam and curse those tech providers that are letting you down. Even better, let's hear some praise for those who are delivering on their promises every day, making your financial institution more competitive and trusted.

Grab the microphone and let your voice be heard! Or grab a pen and write your questions. Either way, this promises to be a valuable knowledge exchange regarding the top-of-mind issues in banking today.

NAILING THE FINTECH INTEGRATION MESSAGE

Tuesday, May 2nd at 2:00 PM—2:45 PM

ERIC HAZARD, CEO, VESTED VENTURES

GREG JASS, CEO, RED LAB

Integrating the latest technology into your core banking system is not just about systems integrations and interoperability. It is also about serving your customers, managing risk and meeting regulatory requirements.

At the center of all of these decisions are the strategic communications decisions your organization must make through the entire fintech buying cycle: from identifying the needs of your financial institution, to selecting your preferred partner, integrating across the systems and communicating the benefits to your internal and external stakeholders.

This interactive session will lead you through best practices on building strong communications strategy to communicate the benefits of your latest fintech integration to your customers, executive suite, board of directors, regulators, and shareholders.

FROM DATA ANALYTICS TO ARTIFICIAL INTELLIGENCE: THE END OF BANKING AS WE KNOW IT?

Tuesday, May 2nd at 3:00 PM—3:45 PM

MARK BLANKESPOOR, PARTNER, JOURNEY TECHNOLOGY SOLUTIONS

JIMMY SAWYERS, CHAIRMAN & CO-FOUNDER, SAWYERS & JACOBS LLC

AI, data analytics, generative language tools … are these all just the latest buzzwords, or can these trends be scaled—daresay even embraced—by community-based financial institutions? Mark and Jimmy will talk about all the latest in these emerging fields and tactical steps that your bank or credit union can take to make sure you are in the best position to take advantage of these innovative tools.

SESSION DETAILS

THE THIN LINE BETWEEN RUNNING AND RUINING A BANK

Wednesday, May 3rd at 9:00 AM—9:45 AM

GREYSON E. TUCK, PRESIDENT, GERRISH SMITH TUCK, PC

The principles of bank management are not terribly complex. It is the execution of those principles that is difficult for some bank managers. This difficulty exposes the thin line between running and ruining a bank. This session will explore this thin line, as well as several notable recent bank failures, to identify the key principles of successful bank management.

TWENTY STRATEGIC TECH PRIORITIES WRAP-UP

Wednesday, May 3rd at 10:00 AM—10:45 AM

JIMMY SAWYERS, CHAIRMAN & CO-FOUNDER, SAWYERS & JACOBS LLC

JOSHUA JACOBS, PRESIDENT & CO-FOUNDER, SAWYERS & JACOBS LLC

Join Jimmy and Joshua for the fast-paced, energetic, and always popular 20 takeaways you can make part of your financial institution's strategic technology initiatives. Go back to your bank or credit union armed with new ideas and fresh perspectives on the latest tech that will have the biggest impact for your market and your organization.

KEYNOTE: LEADING A TRADITIONAL AND SUCCESSFUL BRAND INTO THE FUTURE

Wednesday, May 3rd at 11:00 AM—11:45 AM

BILL DEWITT III, PRESIDENT, ST. LOUIS CARDINALS

From the Dizzy Dean and the Gas House Gang to Stan the Man and Albert "The Machine" Pujols, the St. Louis Cardinals have been a model franchise in major league baseball for more than a century. Known for their strong fan support, the Cardinals enjoy attendance among the league's highest, and despite being in a mid-level market, the Cardinals consistently rank among the top three MLB clubs in local television ratings.

With a long family history in baseball, the DeWitt family purchased the Cardinals in 1996 and ushered in a new era of success with two World Series wins (2006 and 2011), as well as a new stadium and the development of the adjacent Ballpark Village.

Join Bill DeWitt III, President of the St. Louis Cardinals, as he discusses how a small-market team makes a big impact as one of the most innovative and admired brands in professional sports.

KEYNOTE SPEAKER

WILLIAM O. DEWITT III

PRESIDENT, ST. LOUIS CARDINALS



Bill DeWitt III was named President of the St. Louis Cardinals in March 2008. In his role as team President, DeWitt oversees all aspects of the team and its affiliates.

He led the effort to develop Ballpark Village, a mixed-use project adjacent to Busch Stadium, which opened in 2014. In 2020, the Cardinals, along with their development partner The Cordish Companies, opened Phase II of the project which includes an office tower (The PwC Pennant Building), a 200 room boutique hotel (Live! By Loews), a 29-story luxury apartment tower (One Cardinal Way), a health club (Onelife Fitness), and additional retail and restaurants.

Before his appointment to team President, DeWitt was Senior Vice President of Business Development with the Cardinals and oversaw the design and construction of the new Busch Stadium, which opened in April 2006. Prior to that, he was involved in several merchandising, marketing, and operational projects for the team. DeWitt was also involved in the planning for Roger Dean Chevrolet Stadium in Jupiter, Florida, where the Cardinals conduct Spring Training.

DeWitt, 55, graduated cum laude from Yale University in 1990. He then served as an assistant to William Reilly, head of the U.S. EPA in Washington D.C. He earned an MBA from Harvard Business School in 1995. DeWitt is a board member of the Rawlings Corporation, and his charitable affiliations include Cardinals Care (board chair), Big Brothers Big Sisters of Eastern Missouri, the St. Louis Sports Commission, and the Gateway Arch Park Foundation. DeWitt and his wife, Ira, live in St. Louis with their three children – daughter Natalie (24), son Will (21), and son Jabin (10). Bill enjoys golf, ice hockey, and painting in his free time.



FEATURED SPEAKERS

JIMMY SAWYERS



CHAIRMAN & CO-FOUNDER, SAWYERS & JACOBS LLC

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Jimmy Sawyers helps banks tackle issues ranging from strategic technology planning and system selection to cybersecurity and enterprise risk management.

A graduate of Christian Brothers University in Memphis, Tennessee, Jimmy started his career in financial services technology at a fast-growing bank, where he was chosen at the young age of 21 to lead the bank's operations and technology division, becoming one of the youngest officers in the history of this 100-year-old bank. Later, he directed the consulting division of a prominent CPA and consulting firm before joining a tech startup and then co-founding Sawyers & Jacobs LLC.

Jimmy is on the faculty of the Barret Graduate School of Banking at Christian Brothers University, the Southwestern Graduate School of Banking at Southern Methodist University, The Southeastern School of Banking at Belmont University, the Virginia Bankers School of Bank Management at the University of Virginia, and the Mississippi School of Banking at the University of Mississippi, where he teaches technology, payments, cybersecurity, and/or risk management courses at all five schools.

Jimmy has authored two books on technology and risk management in community banks, is a frequent contributor to industry publications, and is a regular on the banking industry speaking circuit.

Known as one of the most independent and informed voices in the industry, in addition to being nationally recognized for his entertaining presentations that engage, inform, and educate, Jimmy always delivers valuable takeaways, practical advice, and a fresh perspective on complex issues.

JOSHUA JACOBS



PRESIDENT & CO-FOUNDER, SAWYERS & JACOBS LLC

jjacobs@sawyersjacobs.com ● 901.651.1340

Joshua Jacobs has 22 years of experience providing information technology consulting services and solutions focusing on financial institutions. He is an Indiana University Kelly School of Business graduate with a Master of Science in Finance (MSF) and a Christian Brothers University graduate with a Master of Business Administration (MBA), a Bachelor of Science in Business Administration with a concentration in Information Technology Management, and a Graduate Certificate in Project Management (GCPM).

He has served as an adjunct faculty member at his alma mater, Christian Brothers University, teaching a course on Digital Forensics that is part of the Cybersecurity & Digital Forensics degree program. Joshua is also on the faculty of the South Carolina Bankers School at Lander University, where he teaches the cybersecurity and banking course. He holds numerous IT and IT security certifications, including the Certified Information Systems Security Professional (CISSP), the GIAC Penetration Tester (GPEN), and the Systems Security Certified Practitioner (SSCP). He specializes in cybersecurity assessments and penetration testing, network design and support, and network virtualization.

FEATURED SPEAKERS

MARK BLANKESPOOR



PARTNER, JOURNEY TECHNOLOGY SOLUTIONS

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Mark has over 36 years of experience in the banking technology arena. As a Journey partner, his focus is on sales and administration. Prior to Journey, Mark was SVP, General Manager Bank Solutions at Fiserv. Mark's career also includes management of customer service and product development.

KATHLEEN CRAIG



FOUNDER & CEO, PLINQIT

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Kathleen Craig is the Founder and CEO of Plinqit. Prior to launching Plinqit, Craig served as the Vice President of eServices at a Michigan-based bank. In that role she was the purchaser and product manager for all client-facing technologies.

Craig's experience in banking, technology and financial management led her to the development of Plinqit, a platform designed with the purpose of changing people's financial future by connecting them to the right content and information from their financial institution. Craig has successfully raised over $10 million in venture funding for Plinqit and has partnered with several of the largest financial technology companies in the world. Plinqit now serves over 50 community institutions in 20+ states ranging from $30 million in assets to over $20 billion in assets.

MARK M. FAIRCLOTH



OWNER, FAIRCLOTH PERFORMANCE PARTNERS

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Mark Faircloth brings over three decades of experience as a successful banker and consultant to his work with Faircloth Performance Partners, serving the financial services industry with a diverse range of consulting solutions. He has provided direct teaching, coaching and mentorship to over 20,000 financial professionals.

Mark's banking experience spans both the retail and commercial sectors, where he served in a variety of front-line sales, management, and marketing positions. He founded Faircloth Performance Partners in 2009 and works with institutions through the U.S. and several foreign countries. He is a recognized expert in commercial relationship negotiations.

Mark is a faculty member at several national, regional, and state banking schools, including the American Bankers Association's Stonier Graduate School the Southwest Graduate School of Banking at SMU and the Graduate School of Banking at LSU. Mark is a frequent speaker at industry conferences and his articles have appeared in several national and international financial publications.

Mark is a graduate of the University of Alabama and the Graduate School of Banking at Louisiana State University.

FEATURED SPEAKERS

TRENT FLEMING



FOUNDER, TRENT FLEMING CONSULTING

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Trent Fleming serves as a trusted adviser to financial institutions on matters of technology, strategy, and management. Fleming's presentations consistently get the highest marks from his audiences. He serves on the faculty of the Graduate School of Banking at the University of Wisconsin, the Advanced School of Banking at Penn State, and the Graduate School of Banking at the University of Florida. He regularly contributes articles to industry publications and publishes the very popular banking newsletter "Trent's Comments." Trent holds a Bachelor of Science in Economics and Finance from Christian Brothers University. When not advising bankers, Trent can be found with a fly rod or at his amateur radio station.

ERIC HAZARD



MANAGING DIRECTOR AT VESTED | CEO, VESTED VENTURES

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Eric Hazard is a financial technology and communications veteran identifying investment opportunities for Vested Ventures, structuring investments and integrating portfolio companies into Vested's complete suite of communications services. During his career, he has worked with some of the most recognizable brands in financial services—such as Charles Schwab, BNY Mellon, Northern Trust, SWIFT and Deutsche Bank—to identify target markets, launch new products, and bring a clearer focus on the value proposition through brand development. Eric began his career at Morgan Stanley as a financial advisor and later worked in the corporate treasury department at Michaels Stores and at Asset International, publishers of Plan Sponsor, Plan Adviser and Global Custodian, as a journalist and publisher. Eric holds a certificate in Fintech from MIT and is the host of the online video series Focus on Fintech.

GREG JASS



CEO, RED LAB

greg@redlabtech.com ● 641.860.0848

Greg Jass is a seasoned marketing professional responsible for leading Group Vested's digital advertising and design and development teams. His career in digital marketing began in 2007 when he worked as an intern for a startup e-commerce company which was later acquired by a large e-commerce holding company. This opportunity allowed Jass to see first hand how the internet would change commerce. Since then, Jass has started and sold two digital agencies (TargetClick acquired by Mudd Advertising, 2012, and Red Lab, acquired by Vested, 2021). Along his journey, he has helped companies like DispatchHealth and Grayscale Investments grow from startups to unicorn status, and he has been an invaluable strategic partner for brands such as Acrisure, Aon, Battle Bank, and VanEck.

Greg has a passion for distilling large, complex challenges into bite-sized meaningful and measurable outputs. He holds a B.A. in Marketing from the University of Northern Iowa.

FEATURED SPEAKERS

DR. EDMOND J. SEIFRIED



CO-CHAIRMAN EMERITUS, SEIFRIED & BREW LLC

seifried@lafayette.edu ● 610.250.9393

Dr. Seifried is Co-Chairman Emeritus at Seifried & Brew, LLC, and Professor Emeritus of Economics and Business at Lafayette College in Easton, Pennsylvania. He also serves as the Executive Consultant for the Sheshunoff CEO Affiliation Programs, and Chief Economist for SB Value Partners.

Dr. Seifried is the Dean of the Virginia and West Virginia Banking Schools and currently is on the faculty of the Southwest Graduate School of Banking. In addition, he has served on the faculty of numerous banking schools, including Stonier Graduate School of Banking and the Graduate School of Banking of the South.

He frequently appears as a guest speaker at regional and national conferences and has delivered over 2,500 economic presentations to various groups both in the United States and abroad. Dr. Seifried is the author of the book, The Art of Strategic Planning for Community Banks. In addition to his academic and consulting experience, Dr. Seifried serves as a director of a community bank.

GREYSON E. TUCK



PRESIDENT, GERRISH SMITH TUCK, PC, ATTORNEYS AND GERRISH SMITH TUCK CONSULTANTS, LLC

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Greyson E. Tuck is President of both the Memphis-based law firm of Gerrish Smith Tuck, PC, and Gerrish Smith Tuck Consultants, both of Memphis, Tennessee. Mr. Tuck's legal and consulting practice places special emphasis on community bank holding company formation and use, community bank mergers and acquisitions, regulatory matters, corporate reorganizations, corporate taxation, general corporate law, and community bank strategic planning. Mr. Tuck is a current faculty member at a number of banking schools across the country and is a dynamic speaker that is a frequent presenter at state and national bank association conferences.

Mr. Tuck comes from a community banking family. He is a graduate of the University of Tennessee, where he majored in Accounting and Finance, and received his law degree from the University of Memphis Cecil C. Humphreys School of Law, where he was a Herff Scholar. Mr. Tuck is a graduate of the Paul W. Barret, Jr. School of Banking and currently serves as a faculty member at a number of banking schools across the country. He is a frequent presenter at national and state bank association conferences and has authored a number of articles of interest to financial institutions.

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Total CPE credits = 14.5 hours

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OTHER INFORMATION



PROGRAM MATERIALS

Each participant will receive a goody bag and other useful materials. Slide handouts will be available for download following the event via the conference website.

ATTIRE

Business casual. Bring a sweater or a jacket should the ballroom be cool.

MEALS

Breakfast will be provided all three days for registered attendees, sponsors, and exhibitors as part of the event fees. Lunch will also be provided for attendees, sponsors, and exhibitors on Day 1 and Day 2. Attend our happy hour reception sponsored by Fiserv on Monday, May 1 at **The Bullock**, located on the Terrace at Live! by Loews. Open bar starts at 4:00 PM, and hors d'oeuvres will be served at the reception. Spouses/significant others are invited to join us for the reception.

Food will also be provided in the all-inclusive, luxurious UMB Champions Club, where we will be attending the Cardinals vs. Angels game at 6:45 PM on Tuesday, May 2 following the last session of the day. Gates will open 1 1/2 hours prior to the scheduled game time.

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