

**BANK TECH SUMMIT**

**SAWYERS & JACOBS**

**LIVE! BY LOEWS**  
**ST. LOUIS • BALLPARK VILLAGE**  
**MAY 6-8, 2024**

**SAWYERS & JACOBS**

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# AT-A-GLANCE AGENDA



**LOCATIONS TO NOTE FOR TODAY:** All sessions will be in the Cardinals Ballroom (2nd Floor). Our breakfast buffet will be set up in the foyer by the Cardinals Ballroom. Lunch will be served on the 2nd Floor Terrace (weather permitting). Our reception will be held at The Bullock, which is on the 2nd Floor Terrace of the hotel.

## MONDAY, MAY 6

**\*\*Today's Beverage Stations Sponsored by Federal Protection, Inc.\*\***

**8:00 AM—9:00 AM**

**Registration and Breakfast**

**\*\*Sponsored by Fiserv\*\***

**9:00 AM—9:45 AM**

**Welcome and Introductions**

*Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC*

**Our Remarkably Resilient Economy**

*Dr. Edmond J. Seifried, Professor Emeritus of Economics and Business, Lafayette College*

**9:45 AM—9:50 AM**

**Tech Talk**

**9:50 AM—10:00 AM**

**Networking/Beverage Break**

**10:00 AM—10:45 AM**

**Top 10 Bank Tech Predictions**

*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**

**New Metrics for Improved Bank Performance: An Unorthodox View of Management Practices**

*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**

**Leadership Is Hard**

*Chris Kelley, Executive Director, Barret School of Banking*

**1:45 PM—1:50 PM**

**Tech Talk**

**1:50 PM—2:00 PM**

**Networking/Beverage Break**

**2:00 PM—2:45 PM**

**Firsthand Accounts of the Second Coming of Third-Party Risk Management**

*Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC*

**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**

**Ransomware Readiness 2024**

*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—5:00 PM**

**Reception at The Bullock**

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# AT-A-GLANCE AGENDA



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Our breakfast buffet will be set up in the foyer by the Cardinals Ballroom.

Lunch will be served on the 2nd Floor Terrace (weather permitting).

## TUESDAY, MAY 7

**\*\*Today's Beverage Stations Sponsored by Federal Protection, Inc.\*\***

**8:00 AM–9:00 AM**

**Breakfast and Ballroom/Exhibit Hall Opens**

**9:00 AM–9:45 AM**

**Demystifying AI: A Guide for Bank Leaders**

*Jack Vonder Heide, CEO,  
Technology Briefing Centers, Inc.*

**9:45 AM–9:50 AM**

**Tech Talk**

**9:50 AM–10:00 AM**

**Networking/Beverage Break**

**10:00 AM–10:45 AM**

**Blending Marketing and Technology  
for New Levels of Success**

*Trent Fleming, Founder,  
Trent Fleming Consulting*

**10:45 AM–10:50 AM**

**Tech Talk**

**10:50 AM–11:00 AM**

**Networking/Beverage Break**

**11:00 AM–11:45 AM**

**Deep Dive into a Business Email Compromise**

*Joshua Jacobs, President, Sawyers & Jacobs LLC*

**11:45 AM–11:50 AM**

**Tech Talk**

**12:00 PM–1:00 PM**

**Lunch**

**1:00 PM–1:45 PM**

**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**

**Always Advance the Brand**

*Tim Pannell, President/CEO, FMS Consulting*

**2:45 PM–2:50 PM**

**Tech Talk**

**2:50 PM–3:00 PM**

**Networking/Beverage/Snack Break**

**3:00 PM–3:45 PM**

**Core Provider Evaluation Stories: Navigating the  
Oligopoly and Vetting the Newcomers**

*Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC*

*Lindsey Alexander, Vice President of Consulting,  
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. New York Mets**

**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 FOR TODAY:** All sessions will be in the Cardinals Ballroom (2nd Floor).

Our breakfast buffet will be set up in the foyer by the Cardinals Ballroom.

We wish you all safe travels and thank you for joining us!

## WEDNESDAY, MAY 8

**8:00 AM–9:00 AM**

Breakfast and Ballroom/Exhibit Hall Opens

*\*\*Sponsored by Fiserv\*\**

**9:00 AM–9:45 AM**

Regulatory Hot Buttons:

Hitting a Home Run on Your Next IT Exam

*Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC*

*Jason Corder, SVP, 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**

Making Your Bank More Efficient:

The Numbers Behind the Tech

*Jamie Sumner, Partner, Velligan-Blaxall Consultants*

**10:45 AM–10:50 AM**

Tech Talk

**10:50 AM–11:00 AM**

Networking/Beverage Break

**11:00 AM–11:45 AM**

Twenty Strategic Tech Priorities Wrap-Up

*Jimmy Sawyers, Chairman, Sawyers & Jacobs LLC*

*Joshua Jacobs, President, Sawyers & Jacobs LLC*

**11:45 AM–11:50 AM**

Tech Talk

**11:50 AM –12:00 PM**

Closing Comments for Day 3 and Prizes



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# SESSION DETAILS

## OUR REMARKABLY RESILIENT ECONOMY: STILL NO RECESSION EVEN WITH THE HIGHEST INTEREST RATES IN OVER TWO DECADES

**Monday, May 6 at 9:00 AM—9:45 AM**

**DR. EDMOND J. SEIFRIED  
PROFESSOR EMERITUS OF  
ECONOMICS AND BUSINESS  
LAFAYETTE COLLEGE**

The US economy continues to baffle experts. The Fed is now in the second year of its battle against inflation which began in the spring of 2022. The FOMC has implemented one of its most powerful anti-inflationary policy regimes in decades. The Fed policy rate currently stands at its highest level in over 20 years. While inflation has responded well to the tightening imposed by the Fed, the current inflation rate remains well above the target of 2.0%.

Surprisingly, the US economy has remained recession-free during the entire process. Real GDP increased 2.5 percent in 2023 (from the 2022 annual level to the 2023 annual level), compared with an increase of 1.9 percent in 2022. However, monetary policy works with a significantly long albeit variable lag, and most experts suspect that the slowdown in economic activity due to almost two years of monetary tightening is sure to kick in soon. Dr. Ed will report on these developments and much more during his session.

## TOP TEN BANK TECH PREDICTIONS: CHICKENS, PIGS, AND FINDING THE TRUE INNOVATORS

**Monday, May 6 at 10:00 AM—10:45 AM**

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

*“The chicken is involved, but the pig was truly committed.”* This favorite old business fable about ham and egg breakfasts is reminiscent of how bank technology ventures seem to be going these days—a lot of eggs continue to be laid, but true commitment has been rare. To be successful, today’s tech providers will have to show commitment and sustainability by providing a solution that

truly is in demand and solves a problem for bankers.

Get the unvarnished truth on today’s latest tech trends from Jimmy so that you can map out your bank’s tech strategy and differentiate between the “chicken” and “pig” tech providers in your search for the true innovators with commitment, sustainability, and stability. During this session, he will give you the insights you need on the latest developments in bank technology, including artificial intelligence (hint: you can’t spell banking without AI), fintech partnerships, cybersecurity threats, and third-party risk management.

## NEW METRICS FOR IMPROVED BANK PERFORMANCE: AN UNORTHODOX VIEW OF MANAGEMENT PRACTICES

**Monday, May 6 at 11:00 AM—11:45 AM**

**MARK M. FAIRCLOTH  
OWNER  
FAIRCLOTH PERFORMANCE PARTNERS**

As succinct as a baseball box score, a handful of metrics has always defined the level of success of a bank. Returns on Assets, Equity and Investment are accurate measures of performance, but do they tell the whole story? And what are the best actions to take to maintain success or to create improvement in a challenging environment?

Mark combines four decades of experience with up-to-the minute perception to introduce new forms of return, asking and answering these management questions:

- Are we smart enough to see the future (or even understand the present)?
- How do managers equip their employees to meet new performance standards?
- How can banks create the best atmosphere for company growth?

Real world concepts, successes, failures, and lessons learned provide a blueprint for understanding and utilizing banking’s new metrics.

# SESSION DETAILS

## LEADERSHIP IS HARD

**Monday, May 6 at 1:00 PM—1:45 PM**

**CHRIS KELLEY**

**EXECUTIVE DIRECTOR**

**BARRET GRADUATE SCHOOL OF BANKING**

This presentation is meant to provide valuable insight into the factors that lead to employee engagement and a positive work culture, including:

- Who are we leading?
- Why do empathy, transparency, and authenticity matter?
- Is there such a thing as work/life balance?

Join Chris as he explores the nuances of effective leadership and why these factors are so critical for community banks today more than ever before.

## FIRSTHAND ACCOUNTS OF THE SECOND COMING OF THIRD-PARTY RISK MANAGEMENT

**Monday, May 6 at 2:00 PM—2:45 PM**

**JIMMY SAWYERS**

**CHAIRMAN & CO-FOUNDER**

**SAWYERS & JACOBS LLC**

Never before have we seen such emphasis on third-party risk management (aka vendor management) by state and federal regulatory agencies. This emphasis has led to regulatory enforcement at some banks that did not consider the risk of certain tech provider partnerships and agreements. How does this increased scrutiny impact your bank? Get the latest information on this hot topic from an objective and informed source that deals with third-party risk management on a daily basis. We will give you the tips and techniques to manage third-party risk and foster mutually beneficial vendor relationships that propel your bank to high performance.

## RANSOMWARE READINESS 2024

**Monday, May 6 at 3:00 PM—3:45 PM**

**JOSHUA JACOBS**

**PRESIDENT & CO-FOUNDER**

**SAWYERS & JACOBS LLC**

While ransomware isn't the most likely type of cybersecurity event that can occur at your financial institution, it is one of the most destructive. Joshua will examine the newest tools and techniques attackers are using to modernize their attack styles to increase the likelihood of ransomware payments. He will then explore a variety of controls you can implement today to help protect against these attacks.

Since there are no guarantees in cybersecurity, he will also explore controls that can be used to mitigate the impact of a ransomware attack if unauthorized access to the network is obtained. Finally, he will discuss potential testing you can perform at your institution to verify that your ransomware protections are working effectively.

## DEMYSTIFYING AI: A GUIDE FOR BANK LEADERS

**Tuesday, May 7 at 9:00 AM—9:45 AM**

**JACK VONDER HEIDE**

**CEO**

**TECHNOLOGY BRIEFING CENTERS, INC.**

Artificial Intelligence (AI) has become a captivating topic, and bank executives and managers are wondering what impact this emerging technology will have and how they should prepare. This informative session is designed to give bankers a basic understanding of AI, its potential benefits, and its inherent risks.

Attendees will discover how AI can drive cost efficiencies, enable more informed decision-making, enhance customer satisfaction, and lead to innovative banking products and services. However, alongside these benefits, the session will critically examine the risks and challenges associated with AI adoption in banking. Topics such as data privacy, security concerns, regulatory compliance, and potential job displacement will be addressed.



# SESSION DETAILS

## **BLENDING MARKETING AND TECHNOLOGY FOR NEW LEVELS OF SUCCESS**

**Tuesday, May 7 at 10:00 AM—10:45 AM**

**TRENT FLEMING  
FOUNDER**

**TRENT FLEMING CONSULTING**

This session will take a hard look at the relationship between marketing and operations. Participants will leave with solid ideas they can put to work at their banks to improve customer satisfaction while reducing the costs of acquiring and servicing accounts. Hear Trent talk about “Smart Growth,” enhancing your online presence, and leveraging data to improve messaging and the customer experience.

## **DEEP DIVE INTO A BUSINESS EMAIL COMPROMISE**

**Tuesday, May 7 at 11:00 AM—11:45 AM**

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

Business Email Compromise (BEC) attacks continue to be one of the more likely cybersecurity events you will experience at your financial institution. Attackers have learned new methods to bypass traditional controls meant to protect your email systems from unauthorized access. Additionally, if the attackers become aware they have obtained access, their goals often change as they attempt to get money out of the financial institution.

Joshua will explore the newest BEC attack methods and walk you through new attack vectors, including token-stealing attacks and password-spray attacks looking for cracks in your controls. Finally, he will explore current best practices, controls, and testing that can help protect your financial institution from this all-too-common attack.

## **BANKERS OPEN MIC: WHAT'S ON YOUR MIND?**

**Tuesday, May 7 at 1:00 PM—1:45 PM**

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

Grab the microphone and let your voice be heard! It's your time to tap into the collective knowledge in the room and get answers to those banking, technology, and cybersecurity questions that keep you up at night. No questions are off limits. Feel free to ask anything! Share your experiences, both good and bad, with your peers. As always, this promises to be a valuable knowledge exchange regarding the top-of-mind issues in banking today.

## **ALWAYS ADVANCE THE BRAND**

**Tuesday, May 7 at 2:00 PM—2:45 PM**

**TIM PANNELL  
PRESIDENT/CEO  
FMS CONSULTING**

When Tim is asked, “What is the number one priority for a bank,” he always has the same answer: “Advance the brand of the organization.” Yes, you always have to manage the balance sheet, mitigate risk, keep up with technology, but ultimately you want to increase the brand equity for the organization. Increased brand equity enhances the internal culture of the bank and results in happier and more productive employees.

Strong brand equity also results in clear differentiation in the marketplace, which results in top-of-mind awareness and the ability to not be limited to competing merely on price. At the end of the day, it is more important that your human capital and the marketplace know you exist, why you exist, what you exist for and what benefit you can bring rather than just knowing you have certain products, (which they probably already knew beforehand). The long-term value of the bank will depend upon the value of the brand.

In this session, Tim will look at the value of the brand and how your bank can be more intentional in always advancing the brand in everything that is communicated internally and externally.

# SESSION DETAILS

## CORE PROVIDER EVALUATION STORIES: NAVIGATING THE OLIGOPOLY AND VETTING THE NEWCOMERS

**Tuesday, May 7 at 3:00 PM—3:45 PM**

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

**LINDSEY ALEXANDER  
VICE PRESIDENT OF CONSULTING  
SAWYERS & JACOBS LLC**

Under the hood, on the showroom floor, and on the road at banks, we have evaluated most of the core solutions on the market and have a wealth of stories to share (within NDA restrictions) about this critical due diligence that represents a bank's largest tech expenditure. Who is on the rise and who is declining? Which solutions will be sunset in the near future? Which provider "gets it" on the digital services side? Because we audit these systems and we evaluate them, we have a unique, multi-lens perspective to relate. In the love-hate relationships many bankers have with their core providers, a little marriage counseling can be beneficial ... but sometimes divorce is inevitable. Learn how bankers have faced these challenges and found core love again.

## REGULATORY HOT BUTTONS: HITTING A HOME RUN ON YOUR NEXT IT EXAM

**Wednesday, May 8 at 9:00 AM—9:45 AM**

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

**JASON CORDER  
SENIOR VICE PRESIDENT  
SAWYERS & JACOBS LLC**

Join the Sawyers & Jacobs team as they recount their experience in working with banks across the nation on IT audit engagements where we see what the state and federal agencies expect from bankers. Hear the latest

exam expectations from those who are in the trenches every day seeing what laws, regulations, and guidelines are being enforced. Put together your game plan to make your next IT examination a bat flip and a trot around the bases!

## MAKING YOUR BANK MORE EFFICIENT: THE NUMBERS BEHIND THE TECH

**Wednesday, May 8 at 10:00 AM—10:45 AM**

**JAMIE SUMNER  
PARTNER  
VELLIGAN-BLAXALL CONSULTANTS, LLC**

In this session, Jamie will delve into the critical metrics and evolving trends shaping the efficiency and productivity landscape within the banking sector. Through an in-depth analysis of key performance indicators (KPIs), we will explore how banks measure and optimize their operational effectiveness, cost management, and resource utilization. By examining current trends, such as the increasing integration of digital technologies, changing consumer behaviors, and regulatory influences, we will uncover insights into the strategies employed by financial institutions to enhance efficiency and drive sustainable growth in an ever-evolving industry landscape.

## TWENTY STRATEGIC TECH PRIORITIES WRAP-UP

**Wednesday, May 8 at 11:00 AM—11:45 AM**

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

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

Always one of our most popular sessions, Jimmy and Joshua use their signature fast-paced and energetic style to recount the top 20 takeaways from Bank Tech Summit that you can incorporate in your financial institution's strategic tech initiatives. Be a winner with your bank or credit union when you come back armed with these fresh perspectives and new ideas on the latest tech innovations that will have the biggest impact for your market and your organization.



# FEATURED SPEAKERS



**JIMMY SAWYERS**

**CHAIRMAN & CO-FOUNDER  
SAWYERS & JACOBS LLC**

[jsawyers@sawyersjacobs.com](mailto:jsawyers@sawyersjacobs.com) • 901.487.2575

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](mailto:jjacobs@sawyersjacobs.com) • 901.651.1340

Joshua Jacobs has 24 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 the University of South Carolina, 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



**LINDSEY ALEXANDER, CPA**

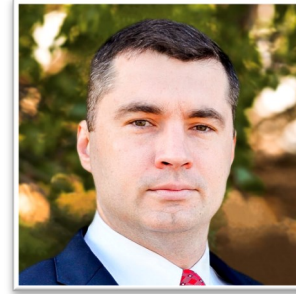
**VICE PRESIDENT OF CONSULTING  
SAWYERS & JACOBS LLC**

[lalexander@sawyersjacobs.com](mailto:lalexander@sawyersjacobs.com) • 901.246.1547

Lindsey Alexander helps our clients with tech provider evaluations, vendor management programs, and risk assessments. Additionally, she plays an active role in new talent recruitment for the firm and manages our social media presence.

Experienced in pricing analyses, advanced data analytics, and financial risk management, Lindsey has worked as a Senior Credit Analyst at a large regional bank, a Financial Analyst at a Fortune 500 company, and at a regional accounting firm. She brings a vast knowledge of financial analysis to our system selection engagements and our vendor management programs, helping our clients get the best return on investment in their tech provider relationships, while also providing helpful insight into our clients' technology vendors.

Lindsey currently serves as an adjunct professor of accounting at Christian Brothers University and Rhodes College. She graduated from Christian Brothers University with a B.S. in Accounting and a Master of Accountancy (MAcc) with a Concentration in Forensic Accounting. Alongside her postgraduate education, Lindsey is a licensed Certified Public Accountant (CPA).



**JASON CORDER, CPA, CISA**

**SENIOR VICE PRESIDENT  
SAWYERS & JACOBS LLC**

[jcorder@sawyersjacobs.com](mailto:jcorder@sawyersjacobs.com) • 901.828.1942

Jason Corder helps our clients with a variety of IT and risk management issues while drawing on his extensive background in bank operations and regulatory compliance. He also leads the Sawyers & Jacobs consulting team in our Northwest Arkansas office and manages relationships with our clients in that region.

Prior to joining our team, he served as Chief Operating Officer and Information Security Officer for a community bank, with responsibilities including oversight of bank operations, information technology, loan review, risk management, and asset/liability management. Jason's banking experience also includes the role of Senior Bank Examiner for the Arkansas State Bank Department. As a Safety and Soundness Examiner, Jason evaluated banks for regulatory compliance, financial soundness, and appropriate risk management controls. He graduated from Arkansas State University with a B.S. in Finance and Union University with a Master of Christian Studies. Jason is licensed as a Certified Public Accountant (CPA), and he holds the Certified Information Systems Auditor (CISA) certification.

# FEATURED SPEAKERS



**MARK M. FAIRCLOTH**

**OWNER**

**FAIRCLOTH PERFORMANCE PARTNERS**

[mark@faircloth-partners.com](mailto:mark@faircloth-partners.com) • 334.742.3828

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 US 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. He 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.



**TRENT FLEMING**

**FOUNDER**

**TRENT FLEMING CONSULTING**

[trent@trentfleming.com](mailto:trent@trentfleming.com) • 901.896.4007

Trent Fleming serves as a trusted adviser to financial institutions on matters of technology, strategy, and management. Trent'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, he can be found with a fly rod or at his amateur radio station.



# FEATURED SPEAKERS



**CHRIS KELLEY**

**EXECUTIVE DIRECTOR  
BARRET SCHOOL OF BANKING**

[chris@barretbanking.org](mailto:chris@barretbanking.org) • 901.321.4000

Chris Kelley has been the Executive Director & President of the Barret School of Banking since 2003. He is a graduate of the Barret Class of 2000 and served as the Alumni Association President. Chris was a board member prior to becoming the Executive Director. He began his banking career in 1995 in a management trainee position with National Bank of Commerce in Memphis. His final role was Senior VP in Branch Administration.

Prior to starting his banking career, Chris played professional baseball for the Texas Rangers. He has an undergraduate degree in finance from the University of Tennessee, where he played baseball, and received his MBA from Christian Brothers University. He was born and raised in Andalusia, Alabama, and moved to Memphis in 1995. He is married with two children.

Chris has served for a number of civic organizations in the Memphis area, including board member of Leadership Memphis and the Community Foundation of Greater Memphis. He has served on the PTA of his children's schools for more than 10 years and has been a volunteer youth sports coach for the past 15 years.



**TIM PANNELL**

**FOUNDER, PRESIDENT, CEO & PARTNER  
FMS CONSULTING**

[tim@financialmarketingsolutions.com](mailto:tim@financialmarketingsolutions.com)

**615.591.2073**

With more than 30 years in bank marketing, Tim Pannell launched FMS Consulting in 2020 along with his brand and life partner, Laurie Pannell. He is also the founder and former president of Financial Marketing Solutions (FMS), which very quickly grew into a nationally acclaimed advertising/branding studio catering exclusively to financial institutions. Drawing together a team of creative experts with more than one hundred years of collective experience, the agency's success was due to a niche focus on providing strategically driven branding and marketing services to banks and credit unions throughout the country.

Tim has been a regular teacher at the American Banking Association's Stonier Graduate School of Banking and the Graduate School of Banking in Wisconsin, LSU Graduate School of Banking, and the Virginia School of Bank Management. He has also spoken extensively as a keynote speaker, participating in panel discussions, state and national conferences, and international business meetings, including European Financial Management & Marketing Association's (EFMA) global banking conference in Paris, Federal Home Bank Conferences, ABA Annual and Community Bank Conferences, California Bankers, Georgia Bankers, Illinois Bankers, Texas Bankers, and Mississippi Bankers.

# FEATURED SPEAKERS



**DR. EDMOND J. SEIFRIED**

**PROFESSOR EMERITUS OF  
ECONOMICS AND BUSINESS  
LAFAYETTE COLLEGE**

[seifried@lafayette.edu](mailto:seifried@lafayette.edu) • 610.250.9393

Dr. Seifried is Professor Emeritus of Economics and Business at Lafayette College in Easton, Pennsylvania. He also serves as the Executive Consultant for the Sheshunoff Affiliation Programs.

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, he serves as a director of a community bank.



**JAMIE SUMNER**

**PARTNER  
VELLIGAN-BLAXALL CONSULTANTS, LLC**

[jsumner@velliganblaxall.com](mailto:jsumner@velliganblaxall.com) • 484.895.1605

Jamie Sumner is a partner of Velligan-Blaxall Consultants, LLC (VBC). He leads the performance analysis team providing institutions with risk vs. reward profiling, risk management, strategic and capital planning, and custom analytics.

Prior to joining VBC, Jamie was a managing partner of Seifried & Brew LLC, where he developed models to measure performance and risk in addition to strategic capital models and risk performance models. Previously, Jamie was the Director of Analytics and Chief Operations Officer at M.RAE Resources, LLC, a financial analyst at BNK Advisory Group, commercial credit analyst at Phillipsburg National Bank, and an accounting clerk at Vista Bancorp, Inc. Since 1997 Jamie has worked in and consulted for community and regional banks in the areas of performance and risk profiling, portfolio management, asset-liability management (ALM), risk assessments, and economics.

Throughout his career, Jamie has worked to develop comprehensive analytical products for senior management and boards of directors to help monitor their financial institutions' risk and performance. His experience in ALM modeling, commercial underwriting, risk assessments, and fixed-income portfolio management is the foundation of his analytical projects and the models he builds.

Over the last 25 years, Jamie has attended and presented to hundreds of boards and ALCO committees across the nation. Additionally, he has spoken at national conferences, taught at banking schools, state org leadership development programs, and the Southwest Graduate School of Banking at SMU.

Jamie earned his Bachelor of Science in Accounting from Alvernia College in Reading, Pennsylvania.

# FEATURED SPEAKERS



## JACK VONDER HEIDE

CEO

TECHNOLOGY BRIEFING CENTERS, INC.

[jv@tbchq.com](mailto:jv@tbchq.com) • 630.789.8222

Jack Vonder Heide is a visionary technology strategist known for his pioneering work in the field of digital innovation. With a career spanning over three decades, Jack has established himself as a trusted authority in the ever-evolving landscape of information technology.

As the founder and CEO of Technology Briefing Centers, Inc., Jack has consistently delivered cutting-edge solutions to organizations seeking to stay ahead of the innovation curve. Jack's commitment to excellence has earned him recognition from large and small banks, privately held businesses, government agencies, and a large list of trade associations. He has been quoted in *The Wall Street Journal*, *The Economist*, *Forbes*, and many other top-tier media outlets.

Jack is a respected thought leader in emerging technologies. He is a graduate of the Artificial Intelligence

Business Strategy program at MIT and the Ethics of AI program at the London School of Economics and Political Science. His forward-thinking approach has empowered businesses to embrace digital transformation and harness the potential of new technologies for growth and innovation.

Jack is a sought-after speaker, sharing his insights at state, national, and international conferences, board meetings, and executive retreats. He has been a guest lecturer at Harvard Law School and other leading institutions.

With his unwavering dedication to advancing the field of digital innovation, Jack Vonder Heide continues to help shape the future of technology.



# CPE SPONSOR



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The **Paul W. Barret, Jr. Graduate School of Banking** is a non-profit independent school created by and governed by a Board of Regents, whose members are executives from banks and other firms involved with the financial services industry. Their mission is to provide a world-class learning experience for the career-oriented individual in commercial banking or a related financial services industry business.

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The Barret Graduate School of Banking offering of Bank Tech Summit is a “group-live” advanced level program for bankers and other financial professionals. No advanced preparation or other prerequisites are required for enrollment. Admission guidelines are stated on the application. For more information regarding administrative policies such as complaint or refund, please contact the School office at 901.321.4000. Participants will receive the following Continuing Professional Education (CPE) credits:

**Total CPE credits = 14.5 hours**

# LOCATION & LODGING

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**799 Clark Street**

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# SPEAKERS, SPONSORS & EXHIBITORS

*In Alphabetical Order as of April 25, 2024*

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**Velligan-Blaxall Consultants, LLC**

# OTHER INFORMATION

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## PROGRAM MATERIALS

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Slide handouts will be available for download following the event via the conference website.

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## ATTIRE

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Business casual for all sessions and the reception. Bring a sweater or a jacket should the ballroom be cool.

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## MEALS

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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.

Also plan to attend our happy hour reception on Monday, May 6 at **The Bullock**, located on the 2nd Floor Terrace at Live! by Loews. Open bar starts at 4:00 PM, and light 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. Mets game at 6:45 PM on Tuesday, May 7 following the last session of the day. Gates will open 1 1/2 hours prior to the scheduled game time.

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## ABOUT SAWYERS & JACOBS LLC

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**Sawyers & Jacobs LLC** helps banks in four major areas: Innovation, Risk Management, Cybersecurity, and Technology. Our mission is to help our *clients use technology securely, effectively, and profitably to better serve their customers, comply with laws and regulations, contain costs, and compete.*

We are ***Making Banks Better™***.

To learn more, email [jsawyers@sawyersjacobs.com](mailto:jsawyers@sawyersjacobs.com), call 901.487.2575, or visit [sawyersjacobs.com](http://sawyersjacobs.com).

