



# Bank Tech Summit 2017



*Lighting the Path to High Performance*



*Watch Risk Like a Hawk*



*Protect the Pack*



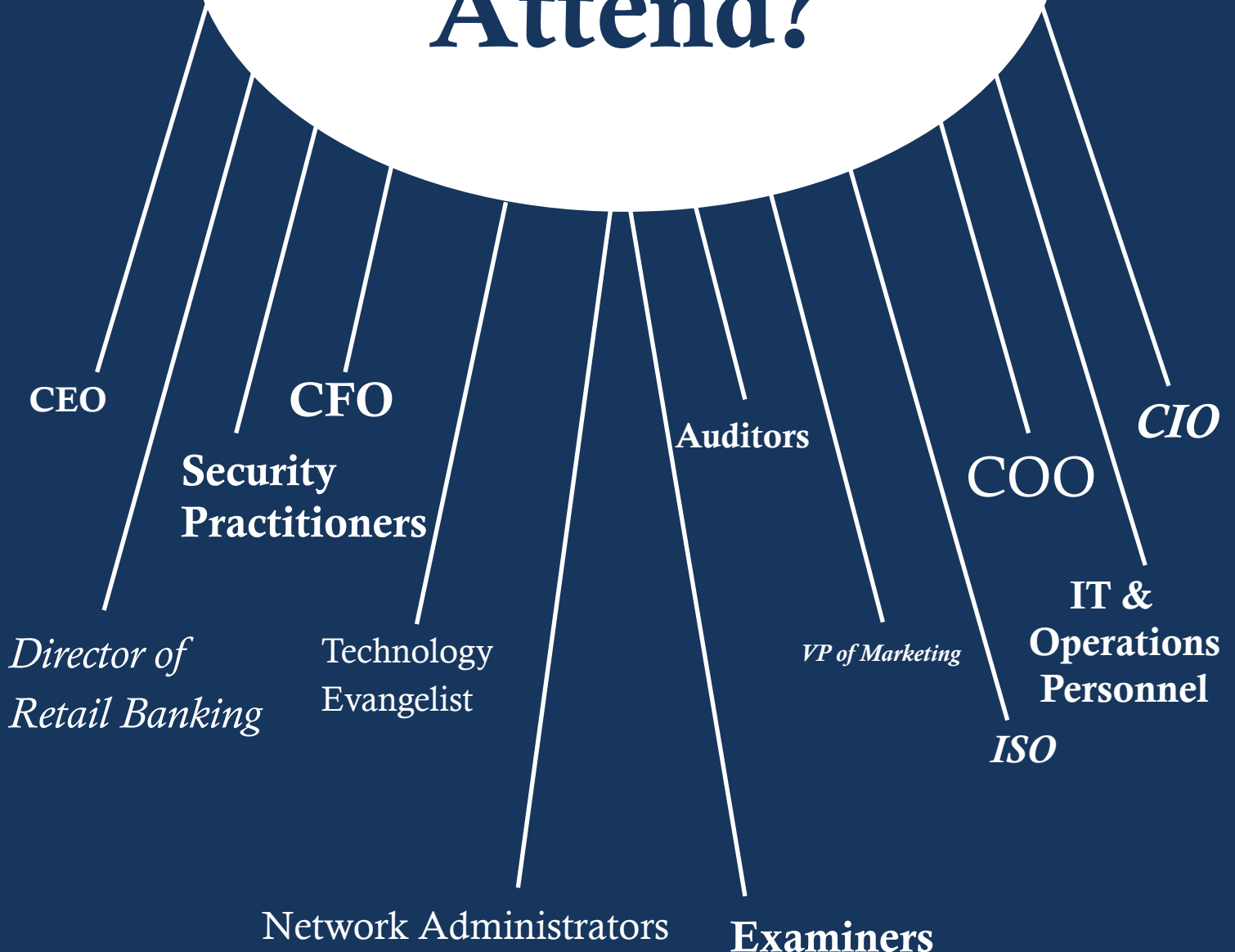
*Your Hero in Tech*

[sawyersjacobs.com](http://sawyersjacobs.com)    **October 25-27 // The Peabody Memphis // Memphis, Tennessee**

# Bank Tech Summit 2017

*The Strategic Technology Event for Community Bankers*

## Who Should Attend?



# Bank Tech

## 2017

*Bankers continue to face the challenges of cybersecurity as they seek the opportunities of digital channels. Flooded by a constant and high-volume stream of information, how does one separate the hype from the reality? Which new companies and solutions are legitimate and which are simply flashy YouTube videos with no substance or basis in reality? How can a bank position for the future by balancing what customers and employees want with the risk-reward proposition that is the business of banking? These are a few of the questions we will attempt to answer at Bank Tech Summit 2017.*

The power of looking forward is apparent in every successful business. Those that prepare for the future are more likely to adapt and succeed in a constantly changing world. Your bank and your career depend on such forward-thinking and strategic planning. **Bank Tech Summit 2017** can help your bank (*and you*) navigate what lies ahead in 2018 and beyond!

Bankers, industry providers, thought leaders, and tech innovators, all representing some of the brightest minds in banking today, will gather **October 25-27**, at the [The Peabody Memphis](#) in *Memphis, Tennessee*. Come prepared to learn about the latest trends and best practices that will change your bank forever.

This year we have consolidated **Bank Tech University** into **Bank Tech Summit** for one contiguous strategic event. Enjoy fast-paced sessions in a high energy yet comfortable environment, free of pushy sales pitches or self-serving product presentations.

We strive to make our event an excellent hub for knowledge exchange as our speakers, exhibitors, bankers, and friends enjoy networking at this invitation-only, exclusive event. Win cool tech prizes while enjoying the historic Peabody Hotel and a taste of Memphis, *home of the blues and the birthplace of rock and roll*.

Once again, we are fortunate that our friends in the industry come together to share ideas and blaze the trail for the banking industry. We thank you for being part of **Bank Tech Summit 2017**, the launching pad for your bank's future.

Sincerely,



**Money Back Guarantee. If you are not 100% satisfied with our event, we will refund your registration fee - no questions asked.**

# CONFERENCE HIGHLIGHTS



Each day we will break to give our guests an opportunity to watch the Peabody Duck March, a tradition that began in the 1930's.



**Win Cool Tech  
Prizes!**



**Network with  
your peers, speakers,  
and leading  
industry providers.**



**Be the Duckmaster! Keep the Cane!**

One lucky participant will have his or her name drawn to be the honorary Duckmaster at the Peabody for the day. Best part...you get to keep the cane!

Jimmy Sawyers & Joshua Jacobs present "25  
Takeaways: Best Practices in Banking, Technology, & Cybersecurity"



**Back by Popular Demand!**

- Mark Faircloth
- Trent Fleming
- Tim Pannell
- Dr. Ed Seifried
- Chuck Wilson



**Reception, Thursday, October 26.  
Open bar starts at 4:30 PM!**

**Don't Miss These Speakers!**

- Mark Blankespoor
- Virginia Heyburn
- Janine Kasper
- Arden Sustad
- Greyson Tuck
- Lee Wetherington

# Bank Tech Top 60 Topics

<b>1. Artificial Intelligence (AI)</b>	<b>31. Leadership</b>
<b>2. Board Tech Education</b>	<b>32. Lending Technology &amp; Workflow</b>
<b>3. Blockchain Technology</b>	<b>33. Managing IT Talent</b>
<b>4. Branch Redesign</b>	<b>34. Mobile App Development</b>
<b>5. Branding</b>	<b>35. Mobile Channel Expansion</b>
<b>6. Business Continuity/Disaster Recovery</b>	<b>36. Mobile Device Management</b>
<b>7. Cash Management Technology</b>	<b>37. Mobile Services Strategies</b>
<b>8. CATO Prevention</b>	<b>38. Natural Language Processing (NLP)</b>
<b>9. Cloud Computing</b>	<b>39. Network Management Best Practices</b>
<b>10. Consumerization of Technology</b>	<b>40. Non-Bank Competition</b>
<b>11. Contract Issues</b>	<b>41. Omni-Channel Delivery</b>
<b>12. Core Processing Trends</b>	<b>42. Onboarding Strategies</b>
<b>13. Corporate Culture</b>	<b>43. Online Advertising</b>
<b>14. Customer Experience (CX &amp; UX)</b>	<b>44. Online Lending</b>
<b>15. Cybersecurity Risk Assessment</b>	<b>45. Operational Efficiency</b>
<b>16. Cybersecurity Trends</b>	<b>46. Organizational Structure</b>
<b>17. Digital Marketing</b>	<b>47. Outsourcing Trends</b>
<b>18. Digital Metrics</b>	<b>48. Payments Innovations</b>
<b>19. Digital Transaction Management</b>	<b>49. Ransomware</b>
<b>20. Disruptive Tech</b>	<b>50. Regulatory Hot Buttons</b>
<b>21. Economic Update</b>	<b>51. Revenue Enhancement</b>
<b>22. Enterprise Risk Management</b>	<b>52. Security Strategies</b>
<b>23. E-Sign Strategies</b>	<b>53. Social Media Trends</b>
<b>24. Faster Payments</b>	<b>54. Strategic Tech Planning</b>
<b>25. FinTech</b>	<b>55. Technology Service Provider (TSP) Selection &amp; Management</b>
<b>26. High Performance Banking</b>	<b>56. Telecom Advances</b>
<b>27. Incident Response</b>	<b>57. Vendor Management</b>
<b>28. Innovation</b>	<b>58. Vetting Niche Providers</b>
<b>29. Interactive Teller Machines (ITM)</b>	<b>59. Voice Banking</b>
<b>30. Killer Gadgets</b>	<b>60. Website Design</b>

# At-A-Glance Agenda



## Wednesday, October 25 - Bank Tech Summit

7:30 AM - 8:15 AM	<i>Exhibit Hall Opens &amp; Registration and Continental Breakfast</i>
8:15 AM - 8:30 AM	<i>Welcome &amp; Introductions</i>
8:30 AM - 9:30 AM	<i>The Zeitgeist of Banking: Lies, Damned Lies, Trends, Fads, and How to Tell the Difference</i> <b>Jimmy Sawyers</b> Sawyers & Jacobs LLC
9:30 AM - 9:45 AM	<i>Networking and Refreshment Break</i>
9:45 AM - 10:45 AM	<i>Advisory Analytics: Complex Reporting, Customer Behavior, &amp; Processing Analysis</i> <b>Arden Sustad &amp; Mark Blankespoor</b> Journey Technology Solutions
10:45 AM - 11:15 AM	<i>DUCK BREAK—World famous Peabody Duck March</i> 
11:15 AM - 12:15 PM	<i>Cybersecurity Trends: Achieving Balance and Harmony in your Cybersecurity Strategy</i> <b>Joshua Jacobs</b> Sawyers & Jacobs LLC
12:15 PM - 1:30 PM	<i>Lunch in the Hernando Desoto Room (on the Mezzanine Level)</i>
1:30 PM - 2:30 PM	<i>PUT ME IN COACH! I'M READY TO...</i> <i>(Recruiting, Hiring, Onboarding, and Retaining the RIGHT Employees)</i> <b>Chuck Wilson</b> Banking Industry Group, Inc.
2:30 PM - 2:45 PM	<i>Networking and Refreshment Break</i>
2:45 PM - 3:45 PM	<i>Cybersecurity Incident Response: Four Scenarios (What Would You Do?)</i> <b>Joshua Jacobs &amp; Jimmy Sawyers</b> Sawyers & Jacobs LLC
3:45 PM - 4:00 PM	<i>Networking and Refreshment Break</i>
4:00 PM - 5:00 PM	<i>Collaboration vs. Confrontation: A Guide to Conflict Resolution</i> <b>Mark Faircloth</b> Faircloth Performance Partners

# At-A-Glance Agenda






Thursday, October 26 - Bank Tech Summit

7:30 AM –8:15 AM	<i>Exhibit Hall Opens &amp; Registration and Continental Breakfast</i>
8:15 AM - 8:30 AM	<i>Welcome &amp; Introductions</i>
8:30 AM - 9:30 AM	<i>Five Game Changers You Need to Know Now</i> Virginia Heyburn Fiserv
9:30 AM - 9:45 AM	<i>Networking and Refreshment Break</i>
9:45 AM - 10:45 AM	<i>Economic Outlook for 2017-18: What Does a Trump Economy Look Like?</i> Dr. Ed Seifried S&B West LLC
10:45AM - 11:15 AM	<i>DUCK BREAK—World famous Peabody Duck March</i> 
11:15 AM - 12:15 PM	<i>Essential Components of Successful Bank Management</i> Greyson Tuck Gerrish Smith Tuck, PC
12:15 PM - 1:45 PM	<i>Lunch in the Hernando Desoto Room (on the Mezzanine Level)</i>
1:45 PM - 2:45 PM	<i>The New Customer and the New Market: Everything has Changed</i> Tim Pannell Financial Marketing Solutions
2:45 PM - 3:00 PM	<i>Networking and Refreshment Break</i>
3:00 PM - 4:30 PM	<i>Fintech FOMO: Community Bank Considerations for Fintech Partnerships</i> Jimmy Sawyers (moderator) Trent Fleming, Trent Fleming Consulting Arden Sustad, Journey Technology Solutions Janine Kasper, Q2
4:30 PM - 5:30 PM	  

# At-A-Glance Agenda



## Friday, October 27 - Bank Tech Summit

8:00 AM - 8:30 AM	<i>Exhibit Hall Opens/Breakfast is Served</i>
8:30 AM - 9:30 AM	<b><i>Directors in a Digital Age</i></b> <b>Trent Fleming</b> Trent Fleming Consulting
9:30 AM - 9:45 AM	<i>Networking and Refreshment Break</i>
9:45 AM - 10:45 AM	<b><i>25 Takeaways: Best Practices in Banking, Technology, and Cybersecurity</i></b> <b>Jimmy Sawyers and Joshua Jacobs</b> Sawyers & Jacobs LLC
10:45 AM - 11:15 AM	<i>DUCK BREAK—World famous Peabody Duck March</i>   
11:15 AM - 12:15 PM	<b><i>Hacking the Hyperbole: The Future DeBunked and Bottom-lined</i></b> <b>Lee Wetherington</b> Jack Henry & Associates
12:15 PM	<i>Prizes, Giveaways, Closing Remarks—Jimmy Sawyers, Sawyers &amp; Jacobs LLC</i>

# Bank Tech 2017

## Speakers



**Mark Blankespoor**

*Partner*

**Journey Technology Solutions**  
journeytechnologiesolutions.com

**Tim Pannell**

*President & CEO*

**Financial Marketing Solutions**  
fms4banks.com

**Mark Faircloth**

*Partner*

**Faircloth Performance Partners**  
faircloth-partners.com

**Jimmy Sawyers**

*Chairman*

**Sawyers & Jacobs LLC**  
sawyersjacobs.com

**Trent Fleming**

*Owner*

**Trent Fleming Consulting**  
trentfleming.com

**Dr. Ed Seifried**

*Co-Chairman*

**S&B West LLC**  
seifriedbrew.com

**Virginia Heyburn**

*Vice President, Insights & Advocacy*

**Fiserv**  
fiserv.com

**Arden Sustad**

*Partner*

**Journey Technology Solutions**  
journeytechnologiesolutions.com

**Joshua Jacobs**

*President*

**Sawyers & Jacobs LLC**  
sawyersjacobs.com

**Greyson Tuck**

*Attorney and Consultant*

**Gerrish Smith Tuck**  
gerrish.com

**Janine Kasper**

*Strategic Business Partner Manager*

**Q2**  
q2ebanking.com

**Lee Wetherington**

*AAP, Director of Strategic Insight*

**Jack Henry & Associates**  
jackhenry.com

**Chuck Wilson**

*Principal*

**Banking Industry Group, Inc.**  
bankingindustrygroup.net

# Bank Tech Summit 2017

## Swag & Prizes



### Win Cool Gadgets & Gizmos



This little light will help you shine as you prepare your Bank's tech strategy!



Enjoy a taste of Memphis with Dinstuhl's chocolate! The Dinstuhl's family has been making quality candy in Memphis for five generations.

...but wait  
there's more!



Each paid participant will receive a free Sawyers & Jacobs laptop bag to carry your conference swag and educational materials.

# Participant Feedback

## What's the buzz about Bank Tech?



*"Possibly the first time I've been to a conference where ALL presentations/speakers had value and were interesting."*

*"Always one of the best organized and thought-out conferences."*

*"This is a great conference and you all pay attention to the small details for attendees."*

*"I appreciate the invitation and thoroughly enjoyed getting to know Sawyers & Jacobs and staff. The presentations were very relevant to the attendees and provided good topics and building blocks to take back and put into action."*

*"I enjoyed the conference very much. The Peabody has been awesome. I was pleasantly surprised how easy it was to get in and out of downtown Memphis."*

*"One of my favorite conferences to attend. Super friendly staff. Fun games and ice breakers. The DJ is great! Prizes are great too!"*

*"Very comfortable setting. I'm glad you didn't do breakout sessions this year. Love this format."*

*"Love the Duck Breaks. I thought that was fun and I loved that y'all let someone at the conference participate as the Duck Master. Good food. GREAT LOCATION! I want to come back and attend ALL days. I have attended a lot of seminars and this is one of the best I have attended because topics were relevant, games & giveaways are fun, speakers were good, location & food were good & format was good. I liked the cybersecurity risk assessment."*

Source: Participant feedback from Bank Tech 2016 evaluations.

# Location and Lodging

## *The Peabody Memphis*

149 Union Avenue  
Memphis, TN 38103  
Phone: 901-529-4000

The Peabody Memphis hotel is located in the heart of downtown Memphis, Tennessee and is just blocks from Beale Street, the Memphis Rock 'n Soul Museum, the Gibson Guitar Factory, FedEx Forum, Sun Studio, Orpheum Theatre, AutoZone Park, countless restaurants, and much more.

Guest rooms offer flat-panel TVs, wireless high speed internet, executive desk, chair, workstation, teleconference capabilities, coffee maker, iron/board, bathrobe, on-command movies, music, internet service, local newspaper, choice of USA Today or Wall Street Journal, and access to The Peabody Athletic Club.

Book your room at The Peabody Memphis 149 Union Avenue, Memphis, TN 38103. A block of rooms has been reserved for October 25-27, 2017. The special room rate will be available until October 4, 2017 or until the group block is sold-out, whichever comes first. To book a room, call 901.529.4000 and ask for Sawyers & Jacobs LLC's group rate.



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:

**14.5 hours of CPE credit for attending Bank Tech Summit**

## **Participating Exhibitors, Speakers, and Sponsors**

**(in alphabetical order, as of October 3, 2017)**

**Banc Intranets, LLC**

**Banking Industry Group**

**Barret Graduate School of Banking**

**Expedient**

**Faircloth Performance Partners**

**Federal Protection**

**Financial Marketing Solutions**

**FIS Global**

**Fiserv**

**Gerrish Smith Tuck, PC**

**Hiscall, Inc.**

**Jack Henry & Associates**

**Journey Technology Solutions**

**Lewis Thomason**

**ProfitStars**

**Protech Systems Group**

**Q2**

**Sawyers & Jacobs LLC**

**S&B West LLC**

**Trent Fleming Consulting**

**Watkins Uiberall, PLLC**

## Program Materials

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

## Attire

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

## Meals

Breakfast will be provided all three days as part of the event fees. Lunch will be provided on day one and day two. Attend our evening reception on Thursday, October 26. Open bar starts at 4:30 PM.

## About the Barret Graduate School of Banking (CPE Sponsor)

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. The mission of the School is to provide an adult learning experience for the career-oriented individual in commercial banking or a related financial services industry business. Visit [www.barret.ws](http://www.barret.ws) or email us at [barret@barret.ws](mailto:barret@barret.ws) to learn more.

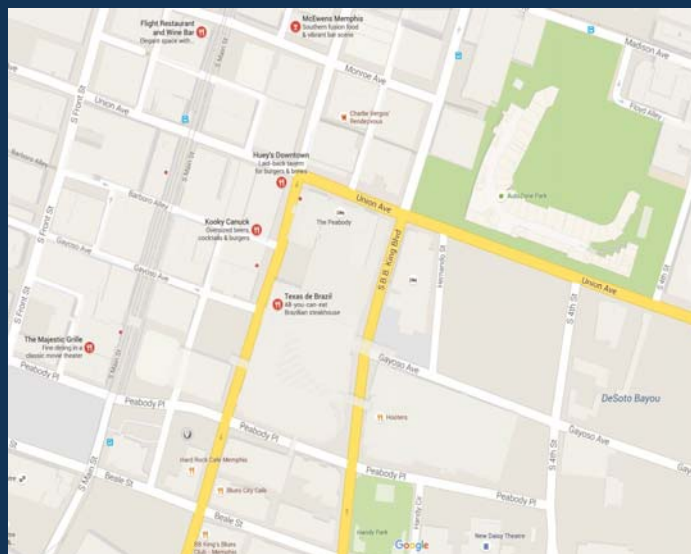
## About Sawyers & Jacobs LLC

**Sawyers & Jacobs LLC** is a consulting firm focused on serving community banks. 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 help banks in the areas of Innovation, Risk Management, Cybersecurity, and Technology. Visit [www.sawyersjacobs.com](http://www.sawyersjacobs.com) to learn more about our firm, our services, and our people. See how we are ***Making Banks Better***.

## Evening Dining

Chez Philippe  
Capriccio Grill  
Huey's  
Charlie Vergos' Rendezvous  
Spaghetti Warehouse  
Automatic Slim's  
Kooky Canuck  
Bangkok Alley  
Central BBQ  
Flying Fish  
Agave Maria  
Texas de Brazil  
McEwen's on Monroe  
Oshi Burger Bar  
Aldo's Pizza Pies  
Majestic Grille  
Flight Restaurant and Wine Bar

Mesquite Chop House  
Yao's China Bistro  
Flying Saucer  
Bluefin Edge  
Pizza Italia  
The Majestic Grill  
Prohibition Lounge  
eighty3  
The Silly Goose  
Pearls Oyster House  
Front Street Delicatessen  
Miss Polly's Soul City Café  
Johnny G's Creole Kitchen  
Blues City Café  
Rum Boogie Cafe  
BB King's Blues Club  
Hard Rock Cafe



# Registration Fees

Early Registration (on or before October 4, 2017)	Fees
<b><i>Bank Tech Summit</i></b>	
First Person	\$890
Second Person (from the same bank)	\$850
Third person (at the same bank)	\$790
<b>Registration (after October 4, 2017)</b>	
<b><i>Bank Tech Summit</i></b>	
First Person	\$990
Second Person (from the same bank)	\$950
Third person (at the same bank)	\$890

*Fees include event materials, refreshment breaks, breakfast, lunch and reception. Fees do not include hotel or transportation. Please note this is an invitation-only event. Sawyers & Jacobs LLC reserves the right to refuse admission to any person at any time.*

<p><b>5 Easy Ways to Register</b></p> <p><b>EMAIL</b>     <b>lzanella@sawyersjacobs.com</b></p> <p><b>FAX</b>        <b>(866) 488-4933</b></p> <p><b>PHONE</b>    <b>(901) 643-5562</b></p> <p><b>MAIL</b>        Sawyers &amp; Jacobs LLC  Attn: Lorri Zanella  1085 Halle Park Circle  Collierville, TN 38017</p> <p><b>ONLINE</b>    <b><u>Bank Tech 2017 Event Page</u></b></p> <p><b>Credit card payments available via <u>online registration</u>.</b></p>	<p><b>Please check below:</b></p> <p><b>_____ BTS Registration</b></p> <p>Note: To take advantage of multiple attendee discounts, all participants must be from the same bank. Please note additional registrants on your completed registration form.</p>
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Name Title

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Email

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Bank/Company

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Phone/Fax

[ ] Check Enclosed: Make checks payable to **Sawyers & Jacobs LLC**

**Early registration for the conference ends October 4, 2017, so register today.** Questions?  
Contact Lorri Zanella ([lzanella@sawyersjacobs.com](mailto:lzanella@sawyersjacobs.com)) at Sawyers & Jacobs LLC, at 901.643.5562.