

SAWYERS  
& JACOBS

PRESENTS

**BANK  
TECH  
SUMMIT  
2019**

**THE STRATEGIC TECHNOLOGY  
EVENT FOR BANKERS!**

**OCTOBER 16-18**

 **THE GUEST HOUSE**  
— AT *Graceland* —  
**MEMPHIS, TN**

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# BANK TECH SUMMIT 2019

THE STRATEGIC TECHNOLOGY EVENT FOR BANKERS!

## WHO SHOULD ATTEND?

- ✓ CEO
- ✓ DIRECTOR OF RETAIL BANKING
- ✓ SECURITY PRACTITIONERS
- ✓ CFO
- ✓ TECHNOLOGY EVANGELIST
- ✓ NETWORK ADMINISTRATORS
- ✓ EXAMINERS
- ✓ AUDITORS
- ✓ VP OF MARKETING
- ✓ ISO
- ✓ COO
- ✓ IT & OPERATIONS PERSONNEL
- ✓ CIO

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***Which digital services are truly in-demand and most profitable? How can banks maintain the payments franchise? How can bankers stimulate the entrepreneurial thinking and creativity needed to compete in a world where customer expectations are on the rise? Get the answers to these questions and more at **Bank Tech Summit 2019**.***

**The King of Rock and Roll** said it best, ***“A little less conversation, a little more action, please; All this aggravation ain’t satisfactioning me...”***

Given the relentless talk about fintechs disrupting traditional banks out of business, payments solutions from large bank and non-bank competitors that could present more threats than opportunities, digital services demands by customers, and cybersecurity concerns ranging from ransomware to brute force hacks, bankers are drowning in information and are often unsure of where to turn for sound strategy and workable solutions. Bad actors in our industry selling “snake-oil” and “vaporware” are not helping the situation.

This is the objective of Bank Tech Summit 2019...to point bankers in the right direction by offering straightforward advice and verifiable case studies on what’s working and what’s not in technology, payments, and cybersecurity.

Some of the best and brightest minds in our industry will lead sessions designed to motivate and inform, entertain and educate, and field your questions on the most important topics in banking today.

For “A little more bite and a little less bark; A little less fight and a little more spark,” we have chosen the Guest House at Graceland in Memphis, Tennessee, to launch your bank into 2020 with the clarity and confidence necessary to succeed. This funky, high-energy, and rocking venue is the perfect environment for our 13th Bank Tech Summit.

We invite you to enjoy this exclusive, invitation-only event where our clients and friends of our firm come together to learn, network, and have fun while winning cool tech prizes and enjoying the music and food of Memphis, home of the blues and the birthplace of rock and roll.

Sincerely,



Co-Founder & Chairman  
Sawyers & Jacobs, LLC

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

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AT Graceland

  
**REDWOLF**  
CYBERSECURITY

  
**REDCAPE**  
TECH SUPPORT

  
**REDTAIL**  
RISK MANAGEMENT

  
**REDTORCH**  
CONSULTING

# BANK TECH SUMMIT 2019

THE STRATEGIC TECHNOLOGY EVENT FOR BANKERS!

## CONFERENCE HIGHLIGHTS

*Network with Your Peers, Speakers, and Exhibitors!*

RECEPTION!  
OPEN BAR!



**BEALE STREET SHUTTLE WILL PROVIDE ACCESS TO OTHER MEMPHIS ATTRACTIONS.**

**WIN COOL TECH PRIZES AND COLD CASH!**



*Enjoy the Elvis Experience!*

- Graceland Mansion VIP After-Hours Tour
- Dinner in Presley Motors Car Museum
- Icons: The Influence of Elvis Presley
- Archives Experience & Private Presley
- Elvis: The Entertainer Career Museum

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 THE GUEST HOUSE  
— AT Graceland —

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 **REDTAIL**  
RISK MANAGEMENT

 **REDTORCH**  
CONSULTING

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## BANK TECH TOP 64 TOPICS

1. Artificial Intelligence (AI)
2. Big Data
3. Board Tech Education
4. Branch Redesign
5. Branding
6. Business Continuity/Disaster Recovery
7. CATO Prevention
8. Cloud Computing
9. Consumerization of Technology
10. Contract Issues
11. Core Processing Trends
12. Corporate Culture
13. Customer Experience (CX & UX)
14. Cybersecurity Education
15. Cybersecurity Insurance
16. Cybersecurity Risk Assessment
17. Cybersecurity Trends
18. Digital-First Customers
19. Digital Metrics
20. Digital Transaction Management
21. Disruptive Tech
22. Economic Update
23. Enterprise Risk Management
24. E-Sign Strategies
25. Faster Payments
26. FinTechs
27. High Performance Banking
28. Incident Response
29. Information Security Office (ISO) Tips
30. Innovation
31. Interactive Teller Machines (ITM)
32. Killer Gadgets
33. Leadership
34. Lending Technology & Workflow
35. Managing IT Talent
36. Mobile Account Opening
37. Mobile Channel Expansion
38. Mobile Device Management
39. Mobile-Only Accounts
40. Mobile Services Strategies
41. Natural Language Processing (NLP)
42. Network Management Best Practices
43. Omni-Channel Delivery
44. Onboarding Strategies
45. Online Lending
46. Operational Efficiency
47. Organizational Structure
48. Outsourcing Trends
49. Payments Innovations
50. P2P Solutions
51. Ransomware
52. Regulatory Hot Buttons
53. Revenue Generation Using Tech
54. Security Strategies
55. Strategic Tech Planning
56. Technology Service Provider (TSP)  
Selection & Management
57. Tech ROI
58. Tech Talent Recruiting & Development
59. Telecom Advances
60. Vendor Management
61. Vendor Management Risk Assessment
62. Vetting Niche Providers
63. Voice Banking
64. Website Design

# BANK TECH SUMMIT 2019

THE STRATEGIC TECHNOLOGY EVENT FOR BANKERS!

## AT-A-GLANCE AGENDA

WEDNESDAY  
OCTOBER 16

**8:00 – 8:45 AM**

### Registration & Continental Breakfast

*the Breakfast is in Ballroom A & B*

Sponsored by FIS

**8:45 – 9:00 AM**

### Welcome and Introductions

**9:00 – 10:00 AM**

### It's Now or Never:

Picking the Tech Trends for 2020

*Jimmy Sawyers RedTorch Consulting  
Sawyers & Jacobs LLC*

**10:00 – 10:15 AM**

### Networking & Refreshment Break

**10:15 – 11:15 AM**

### Aligning Your Bank's Strategic Focus in a Payments Industry That is "All Shook Up"

The Market, the Mergers, Contactless, iGeneration Expectations, and the Changing Customer Experience

*Virginia Heyburn Fiserv*

**11:15 – 11:30 AM**

### Networking & Refreshment Break

Sponsored by Five Iron, LLC

**11:30 – Noon**

### Bankers' Open Mic

An interactive session to hear what is top-of-mind with bankers and discuss how they can propel their banks into 2020 prepared for a new age of technology innovation, customer expectations, and cybersecurity concerns

**Noon – 1:15 PM**

### LUNCH in Ballroom C & D and Visit Exhibitors

**1:15 – 2:15 PM**

### Burning Love:

Increasing Bank Profitability & Customer Satisfaction with Digital Services, Relationship Pricing, and Advanced Data Analytics

*Arden Sustad Journey Technology Solutions*

**2:15 – 2:30 PM**

### Networking & Refreshment Break

Sponsored by FIS

**2:30 – 3:30 PM**

### Don't Be Cruel (with your cybersecurity measures)

Maintaining Balance in Cybersecurity Preparedness, Employee Productivity, and the Customer Experience

*Joshua Jacobs RedWolf Cybersecurity  
Sawyers & Jacobs LLC*

**3:30 – 3:45 PM**

### Networking & Refreshment Break

Sponsored by Q2

**3:45 – 4:15 PM**

### Always on My Mind:

10 Projects That Should be on Your Bank's Radar for 2020

*Jimmy Sawyers RedTorch Consulting  
Sawyers & Jacobs LLC*

**4:15 – 4:45 PM**

### Hound Dogs and Teddy Bears:

Removing the Fear and Fantasy from Vendor Management

*Jimmy Sawyers RedTorch Consulting  
Sawyers & Jacobs LLC*

**4:45 – 5:00 PM**

### Closing Comments for Day One, Gametime & Evening Plans

**5:00 – 6:00 PM**

### Founders' Room Cocktail Reception

**6:00 – 9:30 PM**

### The Elvis Experience:

VIP Tour of Graceland Plus Dinner

**9:30 PM**

### Founders' Room Nightly Cocktail Reception



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AT Graceland

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# BANK TECH SUMMIT 2019

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## AT-A-GLANCE AGENDA

THURSDAY  
OCTOBER 17

**8:15 – 9:00 AM**

**Exhibit Hall Opens & Registration and Continental Breakfast**

*the Breakfast is in Ballroom A & B*  
Sponsored by Five Iron, LLC

**9:00 – 10:00 AM**

**Recession Threat:**

Real or Imagined?

*Dr. Ed Seifried S&B West, LLC*

**10:00 – 10:15 AM**

**Networking & Refreshment Break**

Sponsored by FIS

**10:15 – 10:45 AM**

**Taming the Compliance Beast Through Tech**

*Shaun Harms Bankers Assurance*

**10:45 – 11:00 AM**

**Networking & Refreshment Break**

Sponsored by Five Iron, LLC

**11:00 – Noon**

**Fintech Gut Check:**

How Accelerators and Incubators May Help or Hurt Your Bank

*Scott Mills William Mills Agency*

**Noon – 1:15 PM**

**LUNCH in Ballroom C & D and Visit Exhibitors**

**1:15 – 2:15 PM**

**Suspicious Minds:**

**Creating and Maintaining Trust**

...with customers, teammates, and ourselves

*Mark Faircloth Faircloth Performance Partners*

**2:15 – 2:30 PM**

**Networking & Refreshment Break**

Sponsored by Lewis Thomason

**2:30 – 3:30 PM**

**Heartbreak Hotel:**

Technology Trends You Should Avoid

*Trent Fleming Trent Fleming Consulting*

**3:30 – 3:45 PM**

**Networking & Refreshment Break**

**3:45 – 4:45 PM**

**Can't Help Falling in Love with Fintechs:**

How to Partner for Success

*Kathleen Craig HTMA (HT Mobile Apps)*

**4:45 – 5:00 PM**

**Closing Comments for Day Two, Gametime & Evening Plans**

**5:00 – 6:00 PM**

**RECEPTION**

*the Reception is in Ballroom A & B*

Sponsored by Journey  
Technology Solutions



**6:00 – Midnight**

**Beale Street Shuttle**

(Runs every 30 minutes)

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AT Graceland

  
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# BANK TECH SUMMIT 2019

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## AT-A-GLANCE AGENDA

FRIDAY  
OCTOBER 18

**8:15 - 9:00 AM**

### CONTINENTAL BREAKFAST

*the Breakfast is in Ballroom A & B*

**9:00 - 10:00 AM**

### A Little Less Conversation:

The Art of Innovation

*Noah Scalin Another Limited Rebellion*

**10:00 - 10:15 AM**

Networking & Refreshment Break

**10:15 - 10:45 AM**

### Top 20 Takeaways

*Jimmy Sawyers & Joshua Jacobs Sawyers & Jacobs LLC*

**10:45 - 11:00 AM**

Networking & Refreshment Break

**11:00 - NOON**

### Caught in a Trap:

Strategic Differentiation and the Future of Community Banking

*Lee Wetherington Jack Henry & Associates*

**12:00 - 12:15 PM**

Prizes and Closing Comments



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# BANK TECH SUMMIT 2019

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## SPEAKERS



### ***Kathleen Craig*** Founder & CEO HTMA (HT Mobile Apps)

Htmobileapps.com

**Can't Help Falling in Love with Fintechs:  
How to Partner for Success**

***Thursday, October 17th***

***3:45 PM - 4:45 PM***

*Kathleen Craig, Founder and CEO of HT Mobile Apps, has over a decade of customer service and banking experience.*

*Prior to launching HT Mobile Apps, Kathleen served as the Vice President of eServices at a Michigan based community bank.*

*Kathleen's passion for technology, children and financial education led her to the development of HT Mobile Apps and their first product, Banker Jr, launched in January 2013. Banker Jr. is now licensed by financial institutions in 14 states from financial institutions with \$30 million in assets to over \$15 billion in assets.*

*For the past 3 years, has been extensively researching and beta testing to better understanding the needs of the Millennial market. Their next product innovation, Plinqit is currently launching. Plinqit helps Millennials save money for a specific goal using an automated mobile experience that makes it fun, rewarding and social.*

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Mark Faircloth**

Owner

Faircloth Performance Partners

Faircloth-partners.com

**Suspicious Minds:  
Creating and Maintaining Trust**  
...with customers, teammates, and  
ourselves

**Thursday, October 17th**

**1:15 PM - 2:15 PM**

*Mark Faircloth is the owner of Faircloth Performance Partners, providing training and management consulting to regional and community banks. Mark's advice and programs are based on two decades of front line and executive banking experience combined with a dozen years of consulting in the U.S. and abroad. The resulting solutions are practical, flexible and customized for each client institution.*

*In addition to his day-to-day work with bankers, Mark is a faculty member of several national, regional and state banking schools. He is a frequent speaker at industry conferences and his articles have appeared in a variety of financial publications.*

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

# BANK TECH SUMMIT 2019

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## SPEAKERS



### ***Trent Fleming***

**Owner**

**Trent Fleming Consulting**

trentfleming.com

#### **Heartbreak Hotel:**

Technology Trends You Should Avoid

***Thursday, October 17th***

***2:30 PM - 3:30 PM***

***Trent Fleming*** serves as a trusted advisor to financial institutions.

*He works with management on enterprise and technology strategy, and provides guidance into acquiring and managing technology resources.*

*Fleming serves on the faculty of the Graduate School of Banking at the University of Wisconsin, Penn State University, and regularly contributes articles to industry publications.*

*He also publishes a very popular banking newsletter. Trent holds a BS in Economics and Finance from Christian Brothers University.*

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Shaun Harms** Executive Director Bankers Assurance, LLC

Bankersassurance.net

#### **Taming the Compliance Beast Through Tech**

**Thursday, October 17th**  
**10:15 AM - 10:45 AM**

*Shaun Harms is the founding member and Executive Director of Bankers Assurance, LLC. He is responsible for overseeing the compliance and BSA programs for Bankers Assurance. He has over 15 years of consulting experience.*

*Shaun has extensive knowledge in consumer compliance, fair lending, and BSA. He has performed numerous audits in both consumer compliance and BSA. Shaun has assisted community banks across Arkansas and the surrounding states with compliance and BSA programs. This includes training of bank personnel and assisting banks with implementing comprehensive audit programs.*

*He also specializes in compliance consulting for smaller institutions to assist banks with the overwhelming amount of regulations. This helps institutions to find the expertise that small banks*

*need and provide the bank's Compliance Officer a resource for day to day operations.*

*Shaun graduated from the University of Central Arkansas in 2001 with a Bachelor's degree in Finance. He also graduated from Arkansas State University in 2003 with a Master's degree in Business Administration, and the Barret School of Banking in 2007 (summa cum laude).*

*In addition, Shaun completed the ABA National Compliance School in 2006, and holds the ICB Certified Regulatory Compliance Manager (CRCM), the ICBA Certified Community Bank Compliance Officer (CCBCO), and the ICBA Certified BSA/AML Professional (CBAP) certifications.*

*He was also named as one of Arkansas Business' 40 under 40 for 2014.*

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Virginia Heyburn** Vice President, Strategy and Thought Leadership Fiserv

Fiserv.com

#### **Aligning Your Bank's Strategic Focus in a Payments Industry That is "All Shook Up"**

The Market, the Mergers, Contactless,  
iGeneration Expectations, and the  
Changing Customer Experience

**Wednesday, October 16th**

**10:15 AM - 11:15 AM**

*Virginia Heyburn is a VP of Strategy and Thought Leadership at Fiserv. She advises C-Level executives on industry and consumer trends, business drivers and technology strategies that align with a faster pace of consumer and business innovation. Virginia is a frequent mainstage speaker on the future of financial services, technology innovation for real-time customer service excellence, and outpacing expectations of Gen Y and Gen Z customers who view innovation as a brand and trust builder. Virginia is a yoga teacher, passionate traveler and multi-generational mom to 4 children ranging from 25 to 1.*

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Joshua Jacobs** Co-Founder & President Sawyers & Jacobs LLC

sawyersjacobs.com

#### **Don't Be Cruel (with your cybersecurity measures)**

Maintaining Balance in Cybersecurity Preparedness, Employee Productivity, and the Customer Experience

**Wednesday, October 16th**

**2:30 PM - 3:30 PM**

**Joshua Jacobs** has nineteen 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 Bachelors of Science in Business Administration with a concentration in Information Technology Management, and a Graduate Certificate in Project Management (GCPM).

He is currently serving 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. 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 is also the co-author of the SSCP Study Guide and DVD Training System. He specializes in cybersecurity assessments and penetration testing, network design and support, and network virtualization.

Joshua, his wife Mary, and their four children, live in Collierville, Tennessee.

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Scott Mills** Principal, President William Mills Agency

Williammills.com

#### **Fintech Gut Check:**

How Accelerators and Incubators May Help or Hurt Your Bank

**Thursday, October 17th**

**11:00 AM - Noon**

**Scott Mills** is President of William Mills Agency. He is responsible for guiding the account teams, monitoring tactical activities as they relate to the strategic plan, day-to-day management of the agency and customer service. Since joining the agency in 1989, he has worked in both creative services and client relations.

Scott is also the editor of *Bankers As Buyers*, an annual guide to technologies and spending trends in the financial services industry.

Prior to joining the agency, Scott worked in the entertainment industry for WEKS-FM, WEA (record distribution) and WKLS-FM. He earned a Bachelor of Science degree from Georgia State University. Currently, Scott is on the board of directors of Association for Financial Technology (AFT) and TAG Fintech. Scott is accredited in Public Relations through the Public Relations Society of America.

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Jimmy Sawyers** Co-Founder & Chairman Sawyers & Jacobs LLC

sawyersjacobs.com

#### **It's Now or Never:**

Picking the Tech Trends for 2020

**Wednesday, October 16th**

**9:00 AM - 10:00 AM**

#### **Hound Dogs and Teddy Bears:**

Removing the Fear and Fantasy from Vendor Management

**Wednesday, October 16th**

**4:15 PM - 4:45 PM**

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

*Prior to co-founding Sawyers & Jacobs LLC, Jimmy worked as a community banker, in the consulting division of a CPA firm, and at a tech startup. A graduate of Christian Brothers University in Memphis, Tennessee, Jimmy's 35 years of experience in the financial services technology field includes nine years directing the operations and technology division of a fast-growing bank and 26 years as a consultant to the financial services industry.*

*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 the 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, and nationally recognized for his entertaining presentations that engage, inform, and educate, Jimmy delivers valuable takeaways, practical advice, and a fresh perspective to complex issues.*



# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Noah Scalin**

Founder

Another Limited Rebellion

[noahscalin.com](http://noahscalin.com)

[anotherlimitedrebellion.com](http://anotherlimitedrebellion.com)

**A Little Less Conversation:**  
The Art of Innovation

**Friday, October 18th**

**9:00 AM - 10:00 AM**

*Noah Scalin is an artist, author, and activist. He is the founding partner at Another Limited Rebellion an art & innovation consulting firm that provides creative development training for organizations like GE, Capital One, Mozilla, Altria and more. A graduate of NYU's Tisch School of The Arts, Noah started his career as art director for Troma Entertainment and Avirex clothing. Noah's artwork is collected internationally and has been exhibited in numerous museums and galleries, including the Virginia Museum of Fine Arts and the Mütter Museum as well as NYC's Times Square. He is the author of six books on art & creativity and a sought after public speaker. In 2016 Noah was chosen as the first ever artist-in-residence at the Virginia Commonwealth University's School of Business and was named the "The Region's Most Creative Individual" by Richmond magazine in 2017.*

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Dr. Ed Seifried** Co-Chairman Emeritus S&B West LLC

seifriedbrew.com

**Recession Threat:**  
Real or Imagined?

**Thursday, October 17th**  
**9:00 AM - 10:00 AM**

*Dr. Seifried is Professor Emeritus of Economics and Business at Lafayette College in Easton, Pennsylvania. He also serves as Executive Consultant for the Sheshunoff CEO Affiliation Programs and as Chief Economist for SB Value Partners, L.P.*

*Dr. Seifried serves as the dean of the Virginia and West Virginia Banking Schools and 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 2500 economic presentation 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.*

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Arden Sustad** Co-Founder & Partner Journey Technology Solutions

[journeytechnologiesolutions.com](http://journeytechnologiesolutions.com)

#### **Burning Love:**

Increasing Bank Profitability & Customer Satisfaction with Digital Services, Relationship Pricing, and Advanced Data Analytics

**Wednesday, October 16th**

**1:15 PM - 2:15 PM**

*Journey was founded in July 2012. The four Journey Partners have over a combined 100 years of experience in community bank technology. The Journey Partners observed a gap in the community bank market for an analytics solution. Our answer was the creation of the Journey solution known as I2Asm or Insight 2 Actionsm, combining complex management reporting with customer behavioral analytics.*

*Over the past 35 years, Arden has worked in community bank technology for Burroughs, Precision Computer Systems, Fiserv and now with Journey Technology Solutions. His career area focus included sales and sales management. As a part of sales management Arden negotiated 100's of contracts on behalf of the technology provider. Currently, as one of the founding partners at Journey, Arden's focus is sales, account management and marketing.*

# BANK TECH SUMMIT 2019

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## SPEAKERS



### **Lee Wetherington** Director of Strategic Insight Jack Henry & Associates

jackhenry.com

#### **Caught in a Trap:**

Strategic Differentiation and the  
Future of Community Banking

**Friday, October 18th**

**11:00 AM - Noon**

**Lee Wetherington** is Director of Strategic Insight for Jack Henry & Associates® (JKHY: NASDAQ). Lee directs the development of actionable insight and strategy for the financial services industry at large. To this end, he creates programs, presentations, and articles designed to orient and educate financial executives on the trends and implications of new technologies. He routinely delivers keynotes and forecasts nationwide focusing upon opportunities and challenges in fintech, payments and digital banking, and he is widely renowned for his unique style of comedic delivery.

Lee has delivered keynotes for state, national, and international trade groups, including the American Bankers Association (ABA), Credit Union National Association (CUNA), Independent Community Bankers of America (ICBA), Credit Union Executive Society (CUES), Bank Administration Institute (BAI), National Association of Federal Credit Unions

(NAFCU), World Council of Credit Unions (WOCCU), American Institute of CPAs (AICPA), and the Federal Deposit Insurance Corporation (FDIC). He has also served as Technology Faculty Chair for several graduate schools of banking and management, and has delivered guest lectures on leadership and technology at universities across the country. He was named "Strategic Alliance Executive of the Year" at the 2013 Golden Bridge Awards, which recognizes the world's top executives across every major industry globally. Lee's articles and commentary have been published widely across a variety of major trade publications covering the financial services space.

Lee received bachelor's degrees in economics and English from Duke University in 1990, and, in 1993, he completed graduate studies at Emory University before joining a payments startup born out of the backroom of a community financial institution in South Georgia.

# BANK TECH SUMMIT 2019

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## SWAG & PRIZES

*A little light that will help you shine as you prepare your Bank's strategy!*



**WIN COOL  
GADGETS &  
GIZMOS!**

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

*Dinstuhl's*  
Fine Candies Since 1902

**Enjoy a taste of Memphis with Dinstuhl's chocolate!**

The Dinstuhl's family has been making quality candy in Memphis for five generations.

# BANK TECH SUMMIT 2019

THE STRATEGIC TECHNOLOGY EVENT FOR BANKERS!

## WHAT'S THE BUZZ ABOUT BANK TECH?



### PARTICIPANT FEEDBACK

“This is by far one of the best conferences that I attend. I like the format and the time given to talk one-on-one with the Sawyers & Jacobs team, and networking with other bankers is wonderful.”

“This being my first time to attend Bank Tech Summit. I was really impressed at how well and put together this conference was. Great job! It was well worth my time.”

“First time at Bank Tech and thoroughly enjoyed it. Great topics! Great discussions! Loved the fellowship. Great to meet vendors in person and fellow IT staff supporting banks. Games and prizes make this all even better.”

“Just wanted to tell you how much our team enjoyed the entire conference...not a bad speaker, everything was top notch. I truly appreciate the opportunity to be there! Again...your team was amazing.”

“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.”

# BANK TECH SUMMIT 2019

THE STRATEGIC TECHNOLOGY EVENT FOR BANKERS!

## LOCATION & LODGING



THE GUEST HOUSE  
— AT *Graceland* —

3600 Elvis Presley Blvd.  
Memphis, TN 38116

Guest rooms offer 50-inch HD flat-screen TVs, spa-like Kohler overhead rain shower, mini refrigerator, Keurig coffee brewing system, wireless high-speed internet, executive desk, chair, workstation, iron/board, and room service.

Book your room at The Guest House at Graceland 3600 Elvis Presley Blvd., Memphis, TN 38116. A block of rooms has been reserved for October 16-18, 2019. The special room rate will be available until September 30, 2019 or until the group block is sold-out, whichever comes first.

**To book a room, call 901-473-6084 and ask for Sawyers & Jacobs LLC's group rate.**



# BANK TECH SUMMIT 2019

THE STRATEGIC TECHNOLOGY EVENT FOR BANKERS!

## ABOUT OUR CPE SPONSOR: THE BARRET SCHOOL OF BANKING



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***



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## **PARTICIPATING EXHIBITORS, SPEAKERS, AND SPONSORS**

(IN ALPHABETICAL ORDER AS OF SEPTEMBER 25, 2019)

**360 View**

**Another Limited Rebellion**

**Bankers Assurance**

**Barret Graduate School of Banking**

**Disc Jockeys etc.**

**Faircloth Performance Partners**

**Federal Protection, Inc.**

**FIS Global**

**Fiserv**

**Five Iron, LLC**

**Hiscall, Inc.**

**HTMA (HT Mobile Apps)**

**Jack Henry & Associates/ProfitStars**

**Journey Technology Solutions**

**Lewis Thomason**

**Q2**

**S&B West LLC**

**Sawyers & Jacobs LLC**

**Trent Fleming Consulting**

**William Mills Agency**

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## 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 VIP Tour of Graceland Plus Dinner & Reception from 6:00 PM – 9:30 PM on Wednesday, October 16. Also, be sure to attend our evening reception sponsored by Journey Technology Solutions on Thursday, October 17. Open bar starts at 5:00 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.sawyers-jacobs.com](http://www.sawyers-jacobs.com) to learn more about our firm, our services, and our people. See how we are Making Banks Better.

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## REGISTRATION FEES

### Early Registration

(on or before September 30, 2019)

First Person	<b>\$990</b>
Second Person (from the same bank)	<b>\$850</b>
Third person (at the same bank)	<b>\$790</b>

### Registration

(after September 30, 2019)

First Person	<b>\$1,090</b>
Second Person (from the same bank)	<b>\$950</b>
Third person (at the same bank)	<b>\$890</b>

Fees include event materials, refreshment breaks, breakfast, lunch, The Elvis Experience VIP Tour plus Dinner 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.

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## 5 EASY WAYS TO REGISTER

1. **Online** sawyersjacobs.com

2. **Fax** (866) 488-4933

3. **Phone** (901) 643-5562

4. **Email** ljohnson@sawyersjacobs.com

5. **Mail** Sawyers & Jacobs LLC  
Attn: Lorri Johnson,  
1085 Halle Park Circle,  
Collierville, TN 38017

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.

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**Name**

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**Title**

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**Email**

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**Bank/Company**

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**Street Address**

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**City/State/Zip**

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**Phone/Fax**

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

Credit card payments available via sawyersjacobs.com

Early registration for the conference is allowed until midnight September 30, 2019. Questions? Contact Lorri Johnson (ljohnson@sawyersjacobs.com) at Sawyers & Jacobs LLC, at 901.643.5562.

