

# Bank Tech Summit 2018



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CONSULTING™

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RISK MANAGEMENT™

*Watch Risk Like a Hawk*



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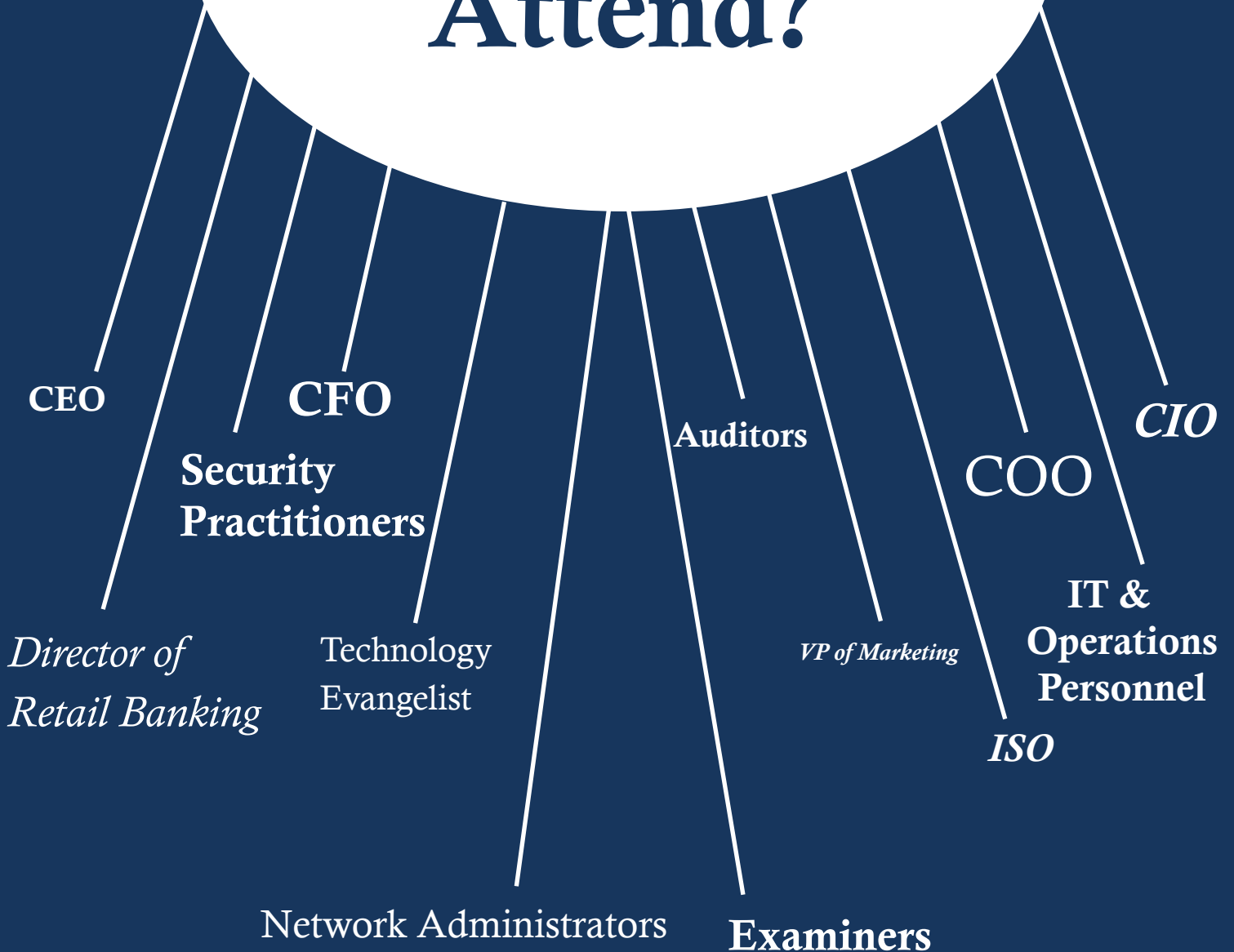
**REDCAPE**  
TECH SUPPORT™

*Your Hero in Tech*

# Bank Tech Summit 2018

*The Strategic Technology Event for Community Bankers*

## Who Should Attend?



# Bank Tech

## 2018

*Will traditional banks be disrupted out of business due to fintech challengers? Is cybersecurity risk being mitigated properly? Are bankers asking the right questions regarding their vendors? As an industry, have we forgotten how important people are to the customer experience equation? Are brick-and-mortar branches dead? Get the answers to these questions and more at Bank Tech Summit 2018.*

Reliable sources of information are becoming harder to find in our world. This is especially true in the banking industry where bankers are being bombarded with new information on fintechs, cybersecurity, payments, vendor management, big data, and a host of other topics. Breaking down this flood of information and considering an effective strategy for success is getting more difficult for bankers. This is where we can help! **Bank Tech Summit 2018** will point you and your bank in the right direction and help you chart a course for 2019 and beyond!

Bankers, industry providers, thought leaders, and tech innovators, all representing some of the best minds in banking today, will gather **November 13-15**, 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.

Enjoy a mix of high-energy speakers and fast-paced sessions in a collegial, comfortable environment, where the exchange of knowledge will be flowing freely.

For the past 12 years, we have hosted this invitation-only, exclusive event where bankers can come together to learn, network, and have fun while winning cool tech prizes and enjoying the grandeur of the historic Peabody Hotel and the music and food of Memphis, *home of the blues and the birthplace of rock and roll*.

We are grateful for our friends in the industry that come together each year to share their knowledge and help our clients and friends map out a strategy for success in their banks and their careers. Thank you for being part of **Bank Tech Summit 2018**, the strategic event for bankers and the catalyst 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!

**Music, Food, and Fun!**

Just a short walk to Beale Street and other area attractions.



Jimmy Sawyers & Joshua Jacobs present  
"Top 20 Takeaways"



**Reception, Wednesday, November  
14. Open bar starts at 5:00 PM!**

**Don't Miss These  
New Speakers!**

- Ed Rhea
- Stan Viner
- Yenu Wodajo

# Bank Tech Top 64 Topics

Artificial Intelligence (AI)	Leadership
Big Data	Lending Technology & Workflow
Board Tech Education	Managing IT Talent
Branch Redesign	Mobile Account Opening
Branding	Mobile Channel Expansion
Business Continuity/Disaster Recovery	Mobile Device Management
CATO Prevention	Mobile-Only Accounts
Cloud Computing	Mobile Services Strategies
Consumerization of Technology	Natural Language Processing (NLP)
Contract Issues	Network Management Best Practices
Core Processing Trends	Omni-Channel Delivery
Corporate Culture	Onboarding Strategies
Customer Experience (CX & UX)	Online Lending
Cybersecurity Education	Operational Efficiency
Cybersecurity Insurance	Organizational Structure
Cybersecurity Risk Assessment	Outsourcing Trends
Cybersecurity Trends	Payments Innovations
Digital-First Customers	P2P Solutions
Digital Metrics	Ransomware
Digital Transaction Management	Regulatory Hot Buttons
Disruptive Tech	Revenue Generation Using Tech
Economic Update	Security Strategies
Enterprise Risk Management	Strategic Tech Planning
E-Sign Strategies	Technology Service Provider (TSP) Selection & Management
Faster Payments	Tech ROI
FinTechs	Tech Talent Recruiting & Development
High Performance Banking	Telecom Advances
Incident Response	Vendor Management
Information Security Office (ISO) Tips	Vendor Management Risk Assessment
Innovation	Vetting Niche Providers
Interactive Teller Machines (ITM)	Voice Banking
Killer Gadgets	Website Design

# At-A-Glance Agenda



## Tuesday, November 13 - Bank Tech Summit

7:30 AM - 8:15 AM	<i>Exhibit Hall Opens &amp; Registration and Continental Breakfast - Sponsored by FIS</i>
8:15 AM - 8:30 AM	<i>Welcome &amp; Introductions</i>
8:30 AM - 9:30 AM	<b><i>Trump, Tax Cuts, and What It Means to You in 2019</i></b> Dr. Ed Seifried S&B West, LLC
9:30 AM - 9:45 AM	<i>Networking &amp; Refreshment Break - Sponsored by Lewis Thomason</i>
9:45 AM - 10:45 AM	<b><i>Fintechs, Foosball, and F***-Ups: How Bankers Can Get Their Tech Strategies Right</i></b> Jimmy Sawyers RedTorch Consulting/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>Sucker-Proofing: How to Invest in the Right Technologies (and what happens when you don't)</i></b> Trent Fleming Trent Fleming Consulting
12:15 PM - 1:30 PM	<i>Lunch in the Hernando Desoto Room (on the Mezzanine Level)</i>
1:30 PM - 2:30 PM	<b><i>Big Data: What Do I Do With It?</i></b> Arden Sustad Journey Technology Solutions
2:30 PM - 2:45 PM	<i>Networking &amp; Refreshment Break - Sponsored by ProTech Systems Group, Inc.</i>
2:45 PM - 3:45 PM	<b><i>Building Your Tech Team: A Blueprint for Success</i></b> Mark Faircloth Faircloth Performance Partners
3:45 PM - 4:00 PM	<i>Networking &amp; Refreshment Break</i>
4:00 PM - 4:30 PM	<b><i>The Mystery of the Mobile-Only Banking Account: A Digital Journey</i></b> Jimmy Sawyers RedTorch Consulting/Sawyers & Jacobs LLC
4:30 PM - 5:00 PM	<b><i>Top Ten Ways to Improve Your Bank's Tech Infrastructure</i></b> Sawyers & Jacobs Team RedCape Tech Support/Sawyers & Jacobs LLC
5:00 PM	<b><i>Adjourn; Dinner on Your Own</i></b>

# At-A-Glance Agenda



Wednesday, November 14 - Bank Tech Summit

8:15 AM - 9:00 AM	<i>Exhibit Hall Opens &amp; Registration and Continental Breakfast</i> <i>Sponsored by BankTEL Systems</i>
9:00 AM - 10:00 AM	<b><i>Cybersecurity Forecast for 2019: Is Your Bank Ready?</i></b> <b>Joshua Jacobs</b> RedWolf Cybersecurity/Sawyers & Jacobs LLC
10:00 AM - 10:15 AM	<i>Networking &amp; Refreshment Break - Sponsored by FIS</i>
10:15 AM - 10:45 AM	<b><i>Mobile, Voice, and Artificial Intelligence: Locating and Leveraging the Next Killer App</i></b> <b>Edward Rhea</b> MEA Financial Enterprises
10:45 AM - 11:15 AM	<i>DUCK BREAK—World-famous Peabody Duck March</i> 
11:15 AM - 12:15 PM	<b><i>Serving the Digital-First Customer: How Bankers Can Deliver</i></b> <b>Kevin Anderson</b> 360 View
12:15 PM - 1:45 PM	<i>Lunch in the Hernando Desoto Room (on the Mezzanine Level)</i>
1:45 PM - 2:15 PM	<b><i>The Right Way to Build a Vendor Management Program</i></b> <b>Jimmy Sawyers</b> RedTail Risk Management/Sawyers & Jacobs LLC
2:15 PM - 2:30 PM	<i>Networking &amp; Refreshment Break - Sponsored by FIS</i>
2:30 PM - 3:00 PM	<b><i>ISO Confused! Intelligent Information Security Strategies That Benefit Banks (Not Vendors)</i></b> <b>Jimmy Sawyers</b> RedTail Risk Management/Sawyers & Jacobs LLC
3:00 PM - 3:15 PM	<i>Networking &amp; Refreshment Break - Sponsored by FIS</i>
3:15 PM - 4:15 PM	<b><i>Payments Innovations: Moving Money Without Losing Money in 2019</i></b> Speaker TBD
4:15 PM - 4:30 PM	<i>Networking &amp; Refreshment Break</i>
4:30 PM - 5:00 PM	<b><i>Open Mic: Bankers Getting Answers</i></b> Group Discussion
5:00 PM - 6:00 PM	 <b>Reception - Sponsored by MEA Financial Enterprises, LLC</b> 

# At-A-Glance Agenda



## Thursday, November 15 - Bank Tech Summit

8:15 AM - 9:00 AM	<i>Exhibit Hall Opens and Continental Breakfast</i>
9:00 AM - 10:00 AM	<b><i>Cybersecurity Insurance: What Bankers Need to Know</i></b> Yenu Wodajo Willis Towers Watson
10:00 AM - 10:15 AM	<i>Networking &amp; Refreshment Break - Sponsored by Fiserv</i>
10:15 AM - 10:45 AM	<b><i>Best Practices for the Care and Feeding of the Banker &amp; Tech Provider Relationship</i></b> Stan Viner SJViner & Associates
10:45 AM - 11:15 AM	<i>DUCK BREAK—World-famous Peabody Duck March</i> 
11:15 AM - 12:15 PM	<b><i>Top 20 Takeaways</i></b> Jimmy Sawyers & Joshua Jacobs Sawyers & Jacobs LLC
12:15 PM	<i>Prizes, Giveaways, Closing Remarks—Jimmy Sawyers, Sawyers &amp; Jacobs LLC</i>



# Bank Tech 2018

## Speakers



**Kevin Anderson**

*Co-founder*

**360 View**

[360view.com](http://360view.com)

**Jimmy Sawyers**

*Chairman*

**Sawyers & Jacobs LLC**

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

**Mark Faircloth**

*Partner*

**Faircloth Performance Partners**

[faircloth-partners.com](http://faircloth-partners.com)

**Dr. Ed Seifried**

*Co-Chairman*

**S&B West LLC**

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

**Trent Fleming**

*Owner*

**Trent Fleming Consulting**

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

**Arden Sustad**

*Partner*

**Journey Technology Solutions**

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

**Joshua Jacobs**

*President*

**Sawyers & Jacobs LLC**

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

**Stan Viner**

*Sales Leader, Speaker, Sales/Marketing Strategist,*

**SJViner & Associates**

**Edward Rhea**

*President & CEO*

**MEA Financial Enterprises, LLC**

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

**Yenu Wodajo**

*Associate Broker, FINEX-Cyber, Media, Intellectual Property*

**Willis Towers Watson**

[willistowerswatson.com/en](http://willistowerswatson.com/en)

# Bank Tech Summit 2018

## 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!

**SAWYERS  
& JACOBS**

Innovation. Risk Management.  
Cybersecurity. Technology.

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

**REDTORCH**  
CONSULTING  
Lighting the Path to High Performance

**REDTAIL**  
RISK MANAGEMENT  
Work with like a hawk

**REDWOLF**  
CYBERSECURITY  
Protect the pack

**REDCAPE**  
TECH SUPPORT  
Your team is back

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?



*"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."*

*"I loved the conference format!"*

*"We enjoyed meeting your staff and attending the conference."*

*"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 found that the current and expected trends of the Summit the most interesting and valuable!"*

*"Overall a well-rounded tech conference."*

*"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 & give-aways are fun, speakers were good, location & food were good & format was good. I liked the cybersecurity risk assessment."*

# 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 November 13-15, 2018. The special room rate will be available until October 12, 2018 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 November 8, 2018)**

**360 View**

**Banc Intranets, LLC**

**BankTEL Systems**

**Barret Graduate School of Banking**

**Disc Jockeys**

**Faircloth Performance Partners**

**FIS Global**

**Fiserv**

**Five Iron**

**Hiscall, Inc.**

**Journey Technology Solutions**

**Lewis Thomason**

**MEA Financial Enterprises**

**ProfitStars/Jack Henry & Associates**

**ProTech Systems Group, Inc.**

**Sawyers & Jacobs LLC**

**S&B West LLC**

**SJViner & Associates**

**Trent Fleming Consulting**

**Willis Towers Watson**



## 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 Wednesday, November 14. 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.

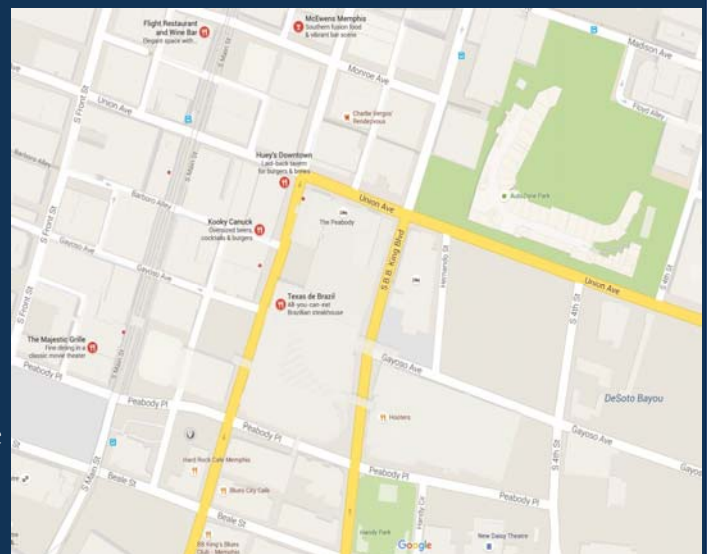
## About Sawyers & Jacobs LLC

**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.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  
Flight Restaurant and Wine Bar  
Automatic Slim's  
Kooky Canuck  
Bangkok Alley  
Central BBQ  
Flying Fish  
Agave Maria  
Texas de Brazil  
McEwen's on Monroe  
Hard Rock Cafe  
Aldo's Pizza Pies

Mesquite Chop House  
Yao's China Bistro  
Flying Saucer  
Bluefin Edge  
Pizza Italia  
BB King's Blues Club  
Prohibition Lounge  
The Majestic Grill  
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



# Registration Fees

<b>Early Registration (on or before October 12, 2018)</b>	<b>Fees</b>
<b><i>Bank Tech Summit</i></b>	
First Person	\$990
Second Person (from the same bank)	\$850
Third person (at the same bank)	\$790
<b>Registration (after October 12, 2018)</b>	
<b><i>Bank Tech Summit</i></b>	
First Person	\$1,090
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>     <a href="mailto:ljohnson@sawyersjacobs.com">ljohnson@sawyersjacobs.com</a></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 Johnson  1085 Halle Park Circle  Collierville, TN 38017</p> <p><b>ONLINE</b>    <a href="#">Bank Tech 2018 Event Page</a></p> <p>Credit card payments available via <a href="#">online registration</a>.</p>	<p><b>Please check below:</b></p> <p><input type="checkbox"/> <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

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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**

**Early registration for the conference ended October 12, 2018, but Sawyers & Jacobs clients are allowed to enjoy early registration pricing until midnight November 9.** Questions? Contact Lorri Johnson ([ljohnson@sawyersjacobs.com](mailto:ljohnson@sawyersjacobs.com)) at Sawyers & Jacobs LLC, at 901.643.5562.