

Your Event for Making the Right Connections

# Experience FinXTech<sup>®</sup>

MAY 14-15, 2024

**Tampa, FL**

*JW Marriott Tampa Water Street*

**Early rate expires April 5, 2024!**

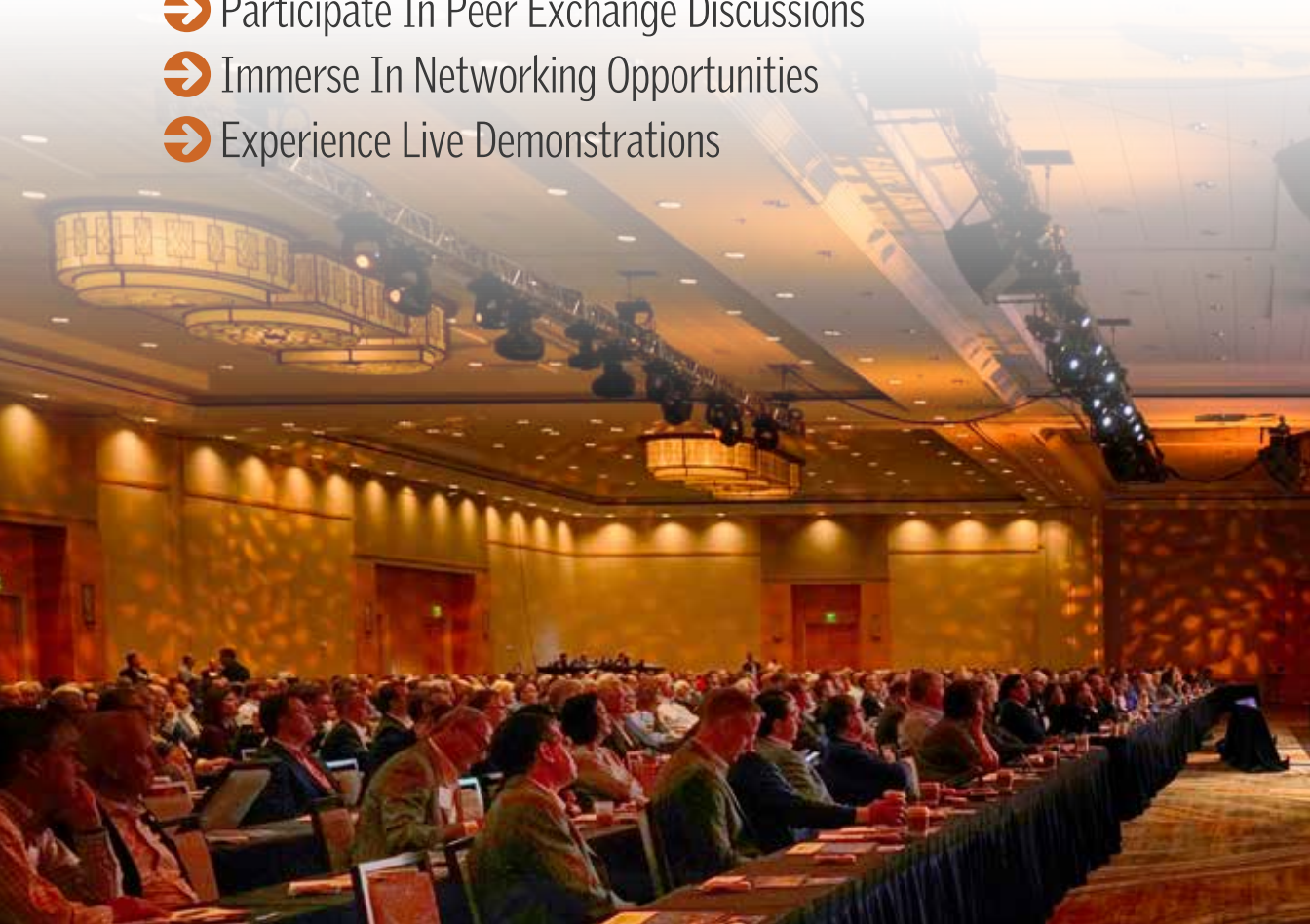
Register by visiting [FinXTech.com](https://FinXTech.com) or calling our events department at (877) 397-7595.

The ideal partnership between financial institutions and technology companies is highly complementary, incredibly powerful and results in lucrative benefits for both sides.

To help develop these strategic connections, Bank Director hosts Experience FinXTech, the industry's leading financial technology event.

During this annual conference, FIs and fintechs connect with like-minded industry leaders, explore cutting-edge technologies and explore new partnership opportunities.

- ➔ Engage In Interactive Technology Sessions
- ➔ Attend Strategy Focused Presentations
- ➔ Participate In Peer Exchange Discussions
- ➔ Immerse In Networking Opportunities
- ➔ Experience Live Demonstrations

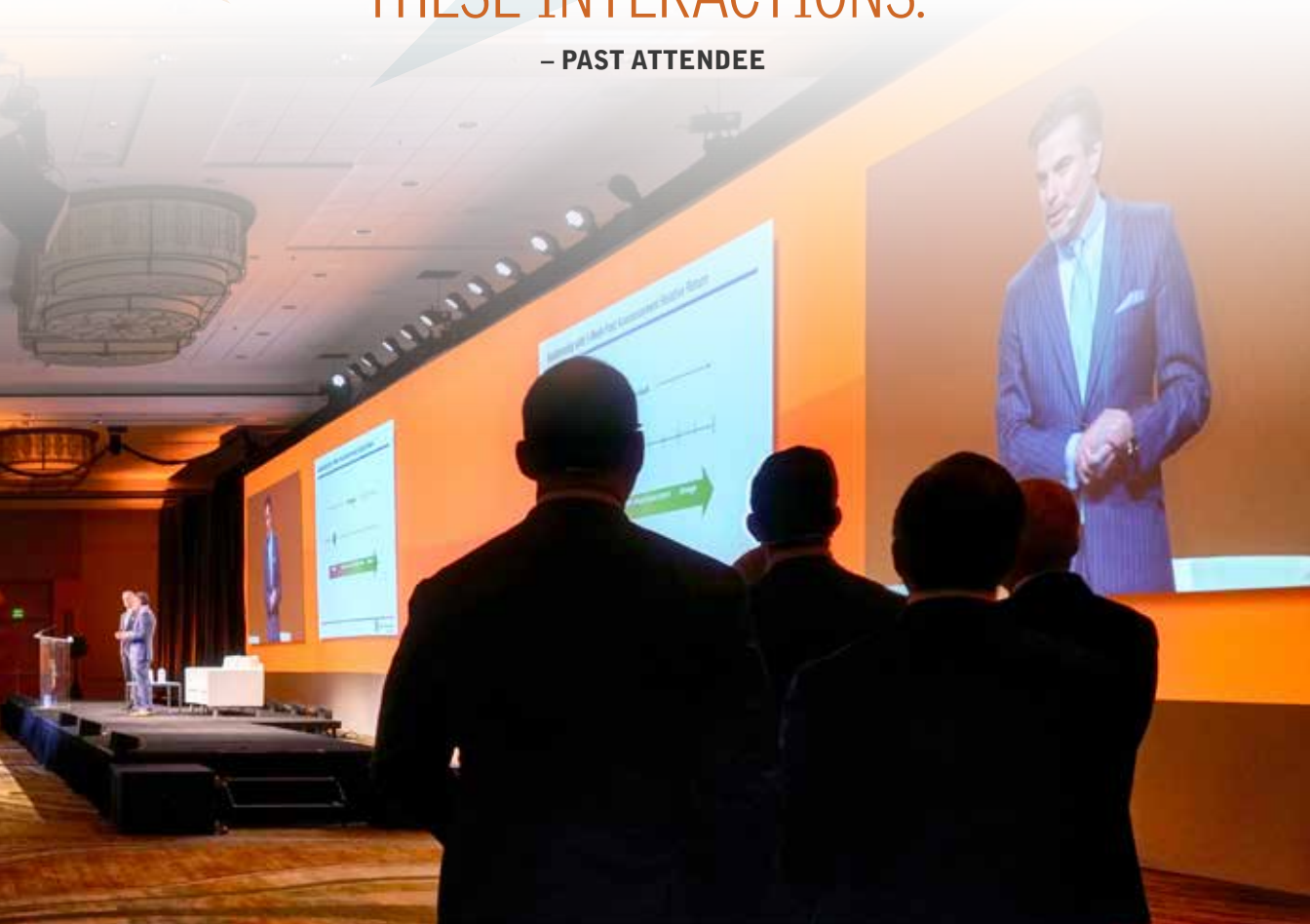


"AS A DIRECTOR, I AM CERTAINLY  
NO TECH-SAVANT. THE CONFERENCE  
WAS A GREAT INTRODUCTION TO ALL  
THAT IS AVAILABLE."

– PAST ATTENDEE

"I ALWAYS LEARN SOMETHING AND  
MAKE GREAT CONNECTIONS FROM  
THESE INTERACTIONS."

– PAST ATTENDEE



# Experience **FinX**Tech<sup>®</sup>

MAKE STRATEGIC  
INVESTMENTS.

UNCOVER NEW  
PARTNERSHIPS.

DISCOVER NEW  
TECHNOLOGIES.

Connect with like-minded leaders and vetted fintech companies to uncover innovative solutions, strategies and ideas that equip your team with fresh perspectives for the future.

Over a two-day period attendees examine the implications of technology to grow one's business and explore how financial institutions and fintechs can thrive through the cultivation of new business relationships, collaboration and strategic investments.

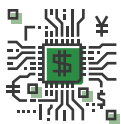
## AT EXPERIENCE FINXTECH YOU CAN...

- ➔ Attend a hands on simulation workshop with real world case studies.
- ➔ Enjoy a complimentary networking reception + dinner cruise.
- ➔ Connect with thoroughly vetted financial technology companies.
- ➔ Receive the latest research around technology + digital banking.
- ➔ Explore new technologies and solutions in our FinXTech Demo Hall.
- ➔ Analyze case studies to develop new ROI and customer experience strategies.

## DID YOU KNOW...



**18%** of respondents in Bank Director's 2023 Technology Survey feel their institution can effectively serve Gen-Z.



**44%** of respondents in Bank Director's 2023 Technology Survey say that digital channels are more critical to their institution's strategy.



**73%** of respondents in Bank Director's 2023 Technology Survey mark staying current on emerging fraud threats as a challenge to their institution's fraud prevention program.



**42%** of respondents in Bank Director's 2024 M&A Survey expanded their product offering within existing business lines and 38% added new business lines or products.

# MAKING THE RIGHT CONNECTIONS

## Interactive Peer Exchanges

Financial institutions and fintech leaders are separated into small groups to discuss topics around technology opportunities and industry challenges during these off-the-record peer exchange discussions.

## Fintech Simulation Workshop

Participants are provided with a multifaceted approach to developing and integrating a technology partnership. Sessions include the how-to's around decision-making, integration, market analysis and more.



## Finding The Right Partner

Through our online portal participants are able to engage in networking opportunities to help find the right partner(s) to align with your institutions business strategies. Register your areas of interest and match up with technology companies in attendance at the conference.

## FinXTech Demo Hall

Attendees have the opportunity to explore and interact with the technology companies featured throughout the event.

## Complimentary Dinner Cruise

Join your fellow attendees on a lively networking reception and dinner cruise. See the bright city lights of Downtown Tampa as you sip and savor your way through cocktails and cuisine while sailing a yacht down the waterways of Tampa Bay. All conference participants and guests are invited aboard!



## Pre-Conference Opportunity Monday, May 13

# FINTECH SIMULATION WORKSHOP

This workshop provides a multifaceted approach to developing and integrating a technology partnership. Sessions include the how-to's around decision-making, integration, market analysis and more. This workshop is exclusive to 45 FI attendees only – up to two FI leaders per institution, and no capital markets titles. *(This session is NOT for investment bank leaders of any kind.)*







**Early rate expires April 5, 2024!** Register by visiting [FinXTech.com](https://FinXTech.com) or calling our events department at (877) 397-7595.

## WORKSHOP AGENDA

*\*Agenda Subject To Change*

Sponsored by: **RSM US LLP**

**1:00 PM - 1:30 PM Registration + Refreshments**

**1:30 PM - 2:30 PM Workshop Session 1: Due Diligence + Strategic Alignment**

Speakers to be Announced, RSM US LLP

Due diligence is an essential part of the partnership process. Only through this step can a financial institution assess the risks, liabilities and potential pitfalls of working with a partner. Addressing these red flags and designing a strategic plan is the necessary next step in the exploratory process. This session dives into how to perform an effective inquiry and how to plan for roadblocks.

**2:30 PM - 2:45 PM Refreshment Break**

**2:45 PM - 3:45 PM Workshop Session 2: Selecting the Right Technology**

As financial institutions consider investing in technology, it is important to look strategically at the areas where the technology can best serve the institution's goals. How do you take the first step? This session explores how to find the right technology for your organization.

**3:45 PM - 4:45 PM Workshop Session 3: Team Integration**

After the due diligence and the planning are completed, FIs must look into the corporate culture of the prospective fintech to ensure they align with their own. This session explores the importance of being culturally aligned, and how it affects the success of the partnership.

**4:45 PM - 5:45 PM Welcoming Reception + Registration**

Our welcoming reception provides participants the chance to meet and mingle with their contemporaries from across the country.

MEET WITH COMPANIES THAT  
STRATEGICALLY ALIGN WITH YOUR  
SHORT- AND LONG-TERM GOALS!

**Pre-Conference Opportunity**  
**Monday, May 13**

# PEER EXCHANGES FOR FINANCIAL INSTITUTIONS + FINTECH LEADERS

Financial institutions and fintech leaders are separated into small groups to discuss topics around technology opportunities and industry challenges during these off-the-record peer exchange discussions.





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## PEER EXCHANGE AGENDA

*\*Agenda Subject To Change*

### 9:30 AM - 10:00 AM **Registration + Breakfast**

### 10:00 AM - 10:10 AM **Welcome**

Laura Schield, Chief Operating Officer, Bank Director & FinXTech

### 10:15 AM - 11:15 AM **Peer Exchange Session 1**

Banks, credit unions and fintech leaders are separated into small groups to discuss topics around opportunities and challenges during these closed-door, off-the-record peer exchange discussions. During the morning sessions, we separate the participants into groups by type (*bank, credit union, fintechs*) and during the afternoon, we mix fintech leaders with banks and credit unions.

FI leaders talk about the opportunities of working with fintechs. Questions for discussion include the following:

- What advice would you give to a fintech company that wanted to work with your institution?
- Where are you finding fintechs?
- What technologies do you find most interesting to consider at your FI?
- Is your FI investing in any new technology right now or planning to in future quarters?
- In what area of fintech do you believe your institution will receive the highest ROI if you were to partner?

Fintech executives talk about the opportunities of working with FI leaders. Questions for discussion include the following:

- How many US financial institutions does your fintech work with at this time? If none, when do you plan to have your first engagement?
- What is your value proposition for the FI?
- What is your plan for scale?
- What is your financial situation?
- How will your fintech integrate operationally at an institution?
- How do you see your space evolving?

### 11:15 AM - 11:30 AM **Refreshment Break**

**JOIN AN AUDIENCE OF YOUR PEERS  
FOR THE INDUSTRY'S LEADING  
FINANCIAL TECHNOLOGY EVENT!**

## 11:30 AM - 12:30 PM **Concurrent Peer Exchange Sessions Continue**

FI leaders talk about the challenges of working with fintechs. Questions for discussion include the following:

- What risks have you faced when working with fintechs?
- Have you had negative experiences when working with fintechs? If so, what happened and how did you move forward?
- What does your due diligence process entail?
- What compliance issues does your FI face as you consider new fintech relationships?
- Who is involved in the decision-making process when considering a new partner/vendor – and how long does the decision process take? Has this been challenging?

Fintech executives talk about the challenges of working with FI leaders. Questions for discussion include the following:

- What has been your biggest challenge when working with an FI?
- Do you find that the decision-making process takes too long?
- Where have you found success when dealing with objections to doing business together?
- How have you priced your product/service so that it is easier for an FI to “dip their toe in” first before jumping all in?
- How do you integrate with the institution’s core? Has this been an issue for your company?

## 12:30 PM - 1:30 PM **Peer Exchange Lunch**

## 1:30 PM - 3:00 PM **Peer Exchange Session 2**

During these afternoon sessions, we change groups and mix fintech leaders with banks and credit unions. Questions for discussion include the following:

- What paths have you taken to align data security policies with the regulations and policies of partnering FIs/ fintechs?
- What is your company’s approach to compliance and risk management?
- What systems have you found/ do you use to ensure data security?
- What are the obstacles you faced regarding company integration in the past and what tools were beneficial in overcoming them?
- What has enabled your success with past partnerships? What factors led to failed partnerships?
- What have you done to ensure value alignment in approaching new partnerships?

## 3:00 PM - 3:15 PM **Refreshment Break**

## 3:15 PM - 4:45 PM **Concurrent Peer Exchange Sessions Continue**

## 4:45 PM - 5:45 PM **Welcoming Reception + Registration**

Our welcoming reception provides participants the chance to meet and mingle with their contemporaries from across the country.



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**Tuesday, May 14**

On day one attendees discuss the state of the current industry, explore topic-based case studies and hear from industry leaders on their lessons learned and best practices for growing in today's current environment.

**DAY ONE**





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## EXPERIENCE FINXTECH AGENDA

*\*Agenda Subject To Change*

### 7:00 AM - 8:00 AM **Breakfast + Registration**

#### 8:00 AM - 8:10 AM **Day One Welcome**

**Michelle King**, President, Bank Director & FinXTech

**Laura Schield**, Chief Operating Officer, Bank Director & FinXTech

As we start the day, we take the pulse of the audience's thoughts on the industry's current state to see if they align with the recent survey results from Bank Director's annual Technology Survey.

#### 8:10 AM - 8:40 AM **The State of the Industry**

**Speaker to be Announced**, RSM US LLP

We open the conference with an overview of where the industry is today and what that means for our audience.

#### 8:40 AM - 8:45 AM **FinXTech Connect**

**Michelle King**, Bank Director & FinXTech

How do you choose the best partners – and where do you start on your quest to find options? Enter FinXTech Connect – an online platform with a curated directory of technology companies strategically partnering with financial institutions of all sizes. Each company on FinXTech Connect is carefully vetted by Bank Director, has a history of financial performance and has a proven roster of FI clients. FinXTech Connect is a tool to help your institution start on its journey to finding the right partner.

### 8:45 AM - 9:35 AM **FinXTech Connect Tech Talks**

Throughout the event, we host FinXTech Connect Tech Talk sessions, showcasing five technology companies financial institutions should be aware of as they consider new strategies. Each presentation focuses on an FI they work with – sharing the problem, the benefit and the steps they took to solve it. The foundation of these talks is how the technology company provided a return on investment for the bank and/or credit union.

#### 8:45 AM - 8:55 AM **Tech Talk 1: Virtual Agent as Front-line Contact Center Generalist Reduces Hold Times + Improves Staffing at United Bank**

**Mark Vanderpool**, President, Directlink

#### 8:55 AM - 9:05 AM **Tech Talk 2: Torpago Enables Financial Institutions to Launch Industry-leading Commercial Credit Card and Spend Management Programs**

**Brent Jackson**, CEO, Torpago, Inc.

**9:05 AM - 9:15 AM**      **Tech Talk 3: Humanizing the Digital Channel By Delivering Personalized Experiences That Create Loyalty + Drive Profitability**

Paul Provenzano, VP Market Development, ebankIT

**9:15 AM - 9:25 AM**      **Tech Talk 4: Innovative Data Tool Drives User Engagement at Listerhill Credit Union**

Matt LaBenz, VP, Sales, Apiture

**9:25 AM - 9:35 AM**      **Tech Talk 5: To Be Announced**  
Speaker to be Announced, Lenders Cooperative

**9:35 AM - 10:20 AM**      **Refreshment Break in Exhibit Hall**

Extended refreshment breaks allow attendees the opportunity to explore and interact with the technologies featured throughout the event. One-on-one meetings can be scheduled at this time.

**10:20 AM - 10:50 AM**      **What Are You Hearing?**

Speaker to be Announced, Jack Henry & Associates, Inc.

Hear from experts in the space on what is coming up next – and what financial leaders must prepare for.

**10:50 AM - 11:40 AM**      **FinXTech Connect Tech Talks**

The second FinXTech Connect Tech Talk session showcases five technology companies financial institutions should be aware of as they consider new strategies. Each presentation focuses on an FI they work with – sharing the problem, the benefit and the steps they took to solve it. The foundation of these talks is how the technology company provided a return on investment for the bank and/or credit union.

**10:50 AM - 11:00 AM**      **Tech Talk 1: To Be Announced**  
Speaker to be Announced, Agent IQ

**11:00 AM - 11:10 AM**      **Tech Talk 2: Driving Digital Fluency, Adoption and Growth**  
John Findlay, CEO, LemonadeLXP

**11:10 AM - 11:20 AM**      **Tech Talk 3: Banking Has Changed. Grow Earnings Today.**  
Mac Thompson, President & Founder, White Clay

**11:20 AM - 11:30 AM**      **Tech Talk 4: Put Simply, Raisin Helps Level the Playing Field for Regional & Community Institutions**  
Cetin Duransoy, CEO, Raisin

**11:30 AM - 11:40 AM**      **Tech Talk 5: To Be Announced**  
Speaker to be Announced, Derivative Path, Inc.





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**11:50 AM - 12:20 PM Partnership Presentations** *(select one)*

This first set of Partnership Presentations allows participants to come together for topic-based case study discussions focused on driving strategy, ROI and customer experience for the financial institution. Led by an industry advisor and one of their clients, these sessions run concurrently, so attendees may select one to attend. *Additional presentations to be announced. For agenda updates, please visit [FinXTech.com](https://FinXTech.com).*

**Partnership Presentation 1: Cannabis Banking: Tech-Driven Compliance for Growth**  
Speaker to be Announced, Shield Compliance, LLC

The legal cannabis industry is projected to generate over \$70 billion in sales by 2030, offering financial institutions an opportunity to capture new low-cost deposits, earning assets and non-interest income by serving licensed cannabis businesses. This session demonstrates how tech-driven compliance not only ensures regulatory adherence but also creates a path forward for sustainable growth in this rapidly changing industry.

**Partnership Presentation 2: The Path to Digital Maturity: Fast, Frictionless  
+ Fully-Automated**

Wesley Zauner, Vice President of Product, MeridianLink

Today's banks understand the importance of optimizing their digital capabilities. From streamlined digital applications, to fast, automated AI-powered loan decisions, today's consumers expect seamless experiences every step of the way. But with so many competing priorities, how do you move forward in the path to digital maturity? Learn how a community bank partnered with MeridianLink to transform their outdated systems and disjointed user experience to a modern ecosystem, leading to automated experiences, increased revenue and decreased costs.



## **Partnership Presentation 3: What to Look for in a Trusted Relationship**

Jennifer Deaver, Director of Sales & Partnerships, HC3

Second only to your employees, your vendors are the most crucial relationships to your organization's success. Drawing on years of lessons learned, this session discusses what it takes to identify, nurture and maintain trusted relationships with vendors

### **12:20 PM - 1:20 PM    Networking Lunch in Exhibit Hall**

Sponsored by: **Atmos Financial, PCB**

Have lunch with key business leaders while also exploring the latest technologies changing the financial industry. One-on-one meetings can be scheduled at this time.

### **1:20 PM - 1:50 PM    The Risk of Not Doing Something**

Nikhil Lakhanpal, Co-founder, Narmi Inc.

Speaker to be Announced, CliftonLarsonAllen LLP

Additional Speaker to be Announced

Moderated by: **Michelle King**, Bank Director & FinXTech

As your bank looks at its strategic growth roadmap, what long-term choices should you be making?

### **1:50 PM - 2:40 PM    FinXTech Connect Tech Talks**

The third FinXTech Connect Tech Talks session provides participants an additional opportunity to hear from 5 technology companies in FinXTech Connect that financial institutions should be aware of as they consider new strategies. Each presenter addresses the problem their company's technology solves, the benefits and the steps to move forward. The foundation of these talks is how the technology company provided a return on investment for the bank and/or credit union. *FinXTech Connect Tech Talks include the following sessions with more to be announced.*

#### **1:50 PM - 2:00 PM    Talk 1: Connectivity is King: Bridging the Legacy Technology Gap**

Michael Ball, SVP, Markets & Strategy, Kinective

#### **2:00 PM - 2:10 PM    Tech Talk 2: Turnkey Lending for Solar – How Fintech Partnerships Can Expand Your Loan Portfolio Without Increasing Staffing**

Ravi Mikkelsen, CEO & Co-founder, Atmos Financial, PCB

#### **2:10 PM - 2:20 PM    Tech Talk 3: To Be Announced**

Speaker to be Announced, RSM US LLP



**Bank Director.**  
Strong Board. Strong Bank.

## 2:50 PM - 3:20 PM **Partnership Presentations** *(select one)*

This second set of Partnership Presentations allows participants to come together for topic-based case study discussions focused on driving strategy, ROI and customer experience for the institution. Led by an industry advisor and one of their clients, these sessions run concurrently, so attendees may select one to attend. *Additional presentations to be announced. For agenda updates, please visit [BankDirector.com](http://BankDirector.com).*

### **Partnership Presentation 1: Running a Data-Driven Cannabis Banking Program**

**Mike Kennedy**, Co-founder and Chief Strategy Officer, Green Check Verified

The legal cannabis industry is expected to grow by 73% by 2026, and forward-thinking financial institutions are building best-in-class programs to grow along with it. In this session, we invite one of our bank clients to discuss their process and strategies for banking the industry, along with their data-driven approach that keeps their customers happy and their program thriving.

## 3:20 PM - 4:05 PM **Refreshment Break in Exhibit Hall**

Extended refreshment breaks allow attendees the opportunity to explore and interact with the technologies featured throughout the event. One-on-one meetings can be scheduled at this time.

## 4:05 PM - 4:35 PM **The Future of Cloud Implementation**

In this session we discuss the benefits of moving core banking systems to the cloud and ways the cloud is giving institutions a leg up in today's competitive landscape.

## 4:45 PM - 5:25 PM **Unveiling Key Banking Trends and Challenges**

**Nicole Lorch**, President & COO, First Internet Bank

**David Ness**, SVP Innovation R&D, U.S. Bank

**Maria Tedesco**, President & COO, Atlantic Union Bank

Moderated by: **Kiah Haslett**, Banking & Fintech Editor, Bank Director

For the last session of the day, we close by hearing from leaders at financial institutions on what has worked and what has not. They share lessons learned and best practices for moving forward.

## 6:00 PM - 8:30 PM **Networking Reception + Dinner Cruise**

See the bright city lights of Downtown Tampa as you sip and savor your way through cocktails and cuisine while sailing a yacht down the waterways of Tampa Bay. All conference participants and guests are invited aboard!



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**Wednesday, May 15**

On day two explore various strategies to expand market share, receive insights on payments, lending, data + analytics and uncover key areas of opportunity.

**DAY TWO**

## EXPERIENCE FINXTECH AGENDA

*\*Agenda Subject To Change*

7:00 AM - 8:00 AM     **Breakfast**

8:00 AM - 8:10 AM     **Day Two Welcome**

Michelle King, President, Bank Director & FinXTech

8:10 AM - 8:40 AM     **Bringing the Digital Deposit Landscape Into Focus**

Parker Graham, Founder & CEO, Finotta

John Major, Director, Government and Institutional Funds, American Deposit Management, LLC

Mary Grace Roske, Head of Marketing, CD Valet

Moderated by: Michelle King, President, Bank Director & FinXTech

Building a digital deposit strategy is imperative in today's financial marketplace. As consumers demand more digital offerings, financial institutions look to align consumer expectations and liquidity. This session considers the best practices to overcome obstacles and risks while staying relevant in a growing digital world.





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**8:40 AM - 9:30 AM FinXTech Connect Tech Talks**

The final FinXTech Connect Tech Talks session provides participants an additional opportunity to hear from 5 technology companies financial institutions should be aware of as they consider new strategies. Each presenter addresses the problem their company's technology solves, the bank's benefit and the steps to move forward. The foundation of these talks is how the technology company provided a return on investment for the bank and/or credit union. *Additional Tech Talks to be announced. For agenda updates, please visit [BankDirector.com](https://BankDirector.com).*

**8:40 AM - 8:50 AM Tech Talk 1: Secure Small Business Deposits by Maximizing Merchant Services for Your SMB Businesses Through Digital Experiences**

Christina Ziegler, Chief Product Officer, Merchant's PACT

**9:30 AM - 10:15 AM Refreshment Break in Exhibit Hall**

Extended refreshment breaks allow attendees the opportunity to explore and interact with the technologies featured throughout the event. One-on-one meetings can be scheduled at this time.

**10:15 AM - 10:45 AM The Changing Payment Landscape**

Wade Arnold, Founder & CEO, Moov Financial

Chris Rigoni, EVP, Senior Director BaaS Operations, Coastal Community Bank

**Additional Speaker to be Announced**

Moderated by: Lexie Grindstaff, Vice President of Business Development, Bank Director

Technology continues to transform the industry, and the payments landscape is no exception. Whether it is the increased demand for contactless and embedded options or a diminishing reliance on analog processes, payments are changing. This session covers the information you need to know to stay up-to-date and competitive amidst the changing payments landscape.

**10:45 AM - 11:15 AM How Financial Institutions Can Embrace Artificial Intelligence**

Mark Leher, Director, Product Management, Alkami Technology, Inc.

Mac Thompson, President & Founder, White Clay

**Additional Speaker to be Announced**

Moderated by: Kiah Haslett, Banking & Fintech Editor, Bank Director

Artificial intelligence in the financial world is not new but it is changing. With its ability to expedite operational tasks, assist in client credit decisions, and improve the efficiency of financial crimes monitoring, AI may be a viable investment for your financial institution. This session explores your myriad options for embracing the technology.

**11:15 AM - 11:20 AM Closing Remarks**

Michelle King, President, Bank Director & FinXTech

# VENUE

## **JW Marriott Tampa Water Street**

510 WATER ST

TAMPA, FL 33602

RESERVATIONS: 813-221-4950

[WWW.MARRIOTT.COM](http://WWW.MARRIOTT.COM)



JW Marriott Tampa Water Street has exceptional amenities ready and waiting. Modern luxury is combined with the sophisticated energy of Tampa's Water Street neighborhood. Relax and bask in the Florida sun from the sixth-floor resort-style pools with private cabanas as you take in scenic water views. Catch an awe-inspiring sunset from the outdoor terrace or savor locally inspired dishes from 6 dining outlets offering indoor and outdoor seating. After a day of exploration, unwind in luxurious guest rooms and suites with stunning cityscape and water views, modern décor and elegant touches.

## DISCOUNTED HOTEL RATE

A discounted hotel room rate is available for conference attendees at the JW Marriott Tampa Water Street until April 19, 2024 or until all rooms are reserved. To reserve a room contact the hotel directly at 813-221-4900 and mention "Bank Director" to receive the discounted rate. Rooms are limited, so please book early!



# RATES & REGISTRATION

The rate includes all conference activities, materials, meals and beverages at the event site. The price does not include travel or hotel accommodations.

## CONFERENCE RATES (Rate applies to financial institutions only):

**FinXTech Connect User/Member Individual Rate: \$995** (Limit one per FI member institution.

Contact [bankservices@bankdirector.com](mailto:bankservices@bankdirector.com) to register.)

**Early Individual Rate: \$1,795** (Expires April 5, 2024)

**Standard Individual Rate: \$1,995**

**Standard Group Rate: \$1,695** (For groups of 3 or more from the same company)

**Financial Institution Peer Exchange: \$995**

**Fintech Simulation Workshop: \$995**

## VENDOR RATE: \$3,450

This fee applies to attendees who are not officers or directors of an FDIC-insured financial institution, such as board advisors/observers, financial technology executives, investment bankers, attorneys, accounting firms, and other vendors and service providers. Bank Director reserves the right to verify your company profile and adjust your registration rate if necessary. If you are interested in speaking at or sponsoring the event, please contact Laura Ramsey at [lramsey@bankdirector.com](mailto:lramsey@bankdirector.com).

## GUEST RATE: \$250

The guest rate of \$250 covers breakfast on Tuesday and Wednesday, as well as all evening receptions. Guests are not allowed to attend sessions. If a guest would like to attend the sessions, please register them as an attendee. A guest is a spouse, significant other or friend who is not in a financial services occupation. A co-worker (even a spouse co-worker) or an associate within the financial services industry is not considered a guest and should register as an attendee.

## MEMBERSHIP PROGRAM CONFERENCE RATES

If your bank is a participating program member, please contact 877-397-7595 to find out about special conference rates and/or event passes that may be available to you and your board. For questions or to find out more about Bank Director's membership program, please email [bankservices@bankdirector.com](mailto:bankservices@bankdirector.com).

## PAYMENTS & CANCELLATION

Conference registration includes admittance to all conference activities and the conference materials. Payment will be accepted by check, American Express, Visa, MasterCard or Discover. If paying by check, please make payable to DirectorCorps, Inc. and include the attendee's name(s) and/or a copy of the registration form and mail to:

Conferences  
Bank Director  
201 Summit View Drive, Suite 250  
Brentwood, TN 37027

Due to commitments and expenses, all cancellations after March 22, 2024 will be subject to a \$300 processing fee. We regret that no refunds will be given after April 12, 2024; however, substitute participants are welcomed. DirectorCorps, Inc. assumes no liability for any nonrefundable travel, hotel or related expenses incurred by registrants.

*The opinions expressed at the conference are those of the individual speakers only and do not necessarily reflect the opinions of Bank Director, the other speakers or the entities with which the speakers are associated.*

# THANK YOU TO OUR SPONSORS!



Derivative **PATH**





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Experience **FinX**Tech®

YOUR EVENT FOR MAKING THE  
RIGHT CONNECTIONS

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