

Your Event for Finding the Right Technology Partner

# Experience **FinX**Tech<sup>®</sup>

SEPT 9-10

**Chicago, IL**

*JW Marriott Chicago*



Brought to you by: **BankDirector.**



**Early Rate Expires July 12, 2019!**

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

# Experience FinXTech®

## YOUR EVENT FOR FINDING THE RIGHT TECHNOLOGY PARTNER

As the very concept of banking evolves, we find an ever-growing number of financial institutions seeking out growth and efficiencies through the application of financial technologies. In September, Bank Director presents: Experience FinXTech – an event to connect key business leaders from across the financial industry.



# MEET YOUR STRATEGIC OBJECTIVES

Over a two-day period, we take a close look at the implications of technology on the business of banking, exploring how and where banks might generate top-line growth and bottom-line profits through the cultivation of new business relationships, collaboration and strategic investments.



## PEER EXCHANGE DISCUSSIONS

Led by an industry advisor, our closed-door, off-the-record peer exchanges bring together groups of bankers and fintech leaders to discuss topics around the opportunities and challenges that lie ahead as they work to integrate new products and innovations.

## WHO SHOULD EXPERIENCE FINXTECH?



### ➔ **Bank Attendees Include:**

CEOs, Chairmen, Presidents, CIOs, CTOs, CFOs, COOs, Heads of Retail, Lending and Strategy – and those executives responsible for new product and strategic growth initiatives.

### ➔ **Technology Attendees Include:**

CEOs, Presidents, Founders and executives focused on expanding their relationship with the banking community.

## SIMULATION WORKSHOPS

Once a bank enters into a new relationship with a technology company – and vice versa – what are the next steps to ensure a successful business relationship? And what best practices should be followed for a seamless integration? Hear answers to these questions and more during the interactive, hands-on workshop sessions.



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# FINXTECH CONNECT DEMONSTRATION SESSIONS

Throughout the event, attendees have an opportunity to attend FinXTech Connect demonstration sessions – allowing participants to learn what technology is available and how it integrates with the bank's current system. All of the companies providing a demonstration have been identified by Bank Director as "bank-friendly" – with a proven history of financial performance and an existing roster of bank clients.

## FinXTech Connect Demonstrations Include:



### SECURITY

Cybersecurity, fraud prevention, customer identification and transaction monitoring



### DATA + ANALYTICS

Leveraging big data, machine learning and artificial intelligence



### INTERNAL SYSTEMS

Improving efficiency and providing the infrastructure to support innovation



### LENDING

Commercial, consumer and mortgage lending programs



### DIGITAL BANKING

Serving customers through online and mobile channels



### PAYMENTS

New payment services for commercial and retail clients



### REGTECH

Regulatory tracking and regulatory compliance



### CUSTOMER EXPERIENCE

Removing friction from the banking experience and improving customer engagement

## 2019 BEST OF FINXTECH AWARDS

Who are the winners of the 2019 Best of FinXTech Awards? During the event, all participants are invited to attend the awards ceremony where we recognize the financial technology solutions within FinXTech Connect that best help a financial institution grow revenues, create efficiencies or reduce risk.

### 2019 Best of FinXTech Awards Recognize:

Best of FinXTech Connect

Best Solution for Customer Experience

Best Solution for Revenue Growth

Best Solution for Loan Growth

Best Small Business Solution

Best Solution for Improving Operations

Best Solution for Protecting the Bank

*If your technology company is currently working with banks and would like to be considered for FinXTech Connect, please visit [FinXTech.com](http://FinXTech.com) to submit an application for consideration.*



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# WELCOMING RECEPTION + **Sunday, September 8** REGISTRATION

5:00 PM - 6:00 PM **Pre-Event Networking Reception + Registration**

This two-day program encourages conversation, inspiration and transformation – and this welcoming reception is the first chance for participants to meet and mingle with executives and key leadership teams from various parts of the financial industry.

Experience **FinX**Tech®

Your Event for Finding the Right Technology Partner

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Brought to you by: **Bank**Director.

DAY  
ONE

**Monday, September 9**



**TRANSFORMING  
THE BANK**



## Early Rate Expires July 12, 2019!

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

### AGENDA

*\*Agenda subject to change*

8:00 AM - 9:00 AM

#### **Breakfast + Registration**

9:00 AM - 9:05 AM

#### **Setting the Stage**

Al Dominick, CEO, Bank Director & FinXTech

As a resource powered by Bank Director, FinXTech specializes in connecting a hugely influential audience of U.S. bank leaders with technology partners at the forefront of innovation. To kick off our annual event, we outline the opportunities available to participants to explore and connect on new ideas, strategies and initiatives to grow their companies.

9:05 AM - 9:10 AM

#### **Executing Your Digital Strategy**

Mika Moser, President, Bank Director & FinXTech

Kevin Tweddle, Chief Operating Officer, ICBA Services Network

This session introduces the types of companies featured in FinXTech Connect that we welcome during this 2-day program.

9:10 AM - 9:50 AM

#### **Keynote Presentation**

What is the future of banking and technology? The event opens with a look at how technology is making an impact on our world and what is to come.

9:50 AM - 10:20 AM

#### **Interactive Expo + Refreshment Break**

Sponsored by: **PayNet Inc.**

Extended refreshment breaks allow attendees the opportunity to explore and interact with the technologies featured throughout the event.

## EXPERIENCE FINXTECH CONNECT DEMONSTRATION SESSIONS

Learn what technology is available by hearing what is out there in regards to security, data & analytics, internal systems, lending, digital banking, payments, regtech and customer experience! Each demo session follows the same 20-minute format: 5 minute demo of the product or service, 5 minutes to hear how banks can utilize the product or service, 5 minutes to hear how implementation occurs and 5 minutes for Q&A.

### 10:20 AM - 10:40 AM **FinXTech Connect Demonstration Sessions: ROUND I**

#### Demo I



#### **SECURITY**

This demonstration will offer solutions that focus on cybersecurity, fraud prevention, customer identification and transaction monitoring.

#### Demo II



#### **DATA + ANALYTICS**

Speaker To Be Announced, MX Technologies Inc.

Learn how to leverage big data, machine learning and AI to predict customer and market behavior.

#### Demo III



#### **INTERNAL SYSTEMS**

**Bobby Childs**, Director of Marketing & Business Development, Integrated Legacy Solutions

Let's face it, no one likes to engage in a data conversion as it is often a painful process. ILS has designed innovative ways to "migrate" legacy data more quickly, affordably and with less disruption than other costly and time consuming traditional methods of conversion. Join us to learn more!

#### Demo IV



#### **LENDING**

**Will Cameron**, Senior Manager, Area Vice President, nCino  
**Kathryn McKoy**, Senior Product Specialist, nCino

nCino's Bank Operating System spans business lines to provide a true single platform experience by streamlining the entire loan origination process, offering a deposit account opening feature for in-branch or online and providing a treasury management solution that reduces manual tasks and offers transparency to the customer and the employee.

#### Demo V



#### **DIGITAL BANKING**

**Drew Sievers**, CEO, Trizic Inc.

Learn how Trizic's integrated and flexible technology is helping banks replace expensive manual processes and evolve beyond their old, inefficient systems. This demo is for any bank that wants to grow assets, keep deposits and profitably offer mass affluent wealth solutions to their entire customer base.

#### Demo VI



#### **PAYMENTS**

Find out how this solution enables banks to offer new payment services to commercial and retail clients.



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### 10:50 AM - 11:10 AM **FinXTech Connect Demonstration Sessions: ROUND II**

#### Demo I

#### **REGTECH**



Is your bank looking for new solutions that track regulations and help the bank comply with them? Attend this demonstration to find out what tools are available to you and your bank.

#### Demo II

#### **CUSTOMER EXPERIENCE**



**Kathleen Craig**, Founder & CEO, Plinqit

Plinqit, developed by HTMA, is designed to help banks connect with consumers in a meaningful, relevant way by bringing together digital customers, banks and savings in one place. This demo is for banks that want to increase deposit share, deepen relationships with current customers and prospects and leverage data and analytics to cross sell relevant products and services.

#### Demo III

#### **SECURITY**



This demonstration offers solutions that focus on cybersecurity, fraud prevention, customer identification and transaction monitoring.

#### Demo IV

#### **INTERNAL SYSTEMS**



Improve efficiency and provide the infrastructure banks need to support innovation.

#### Demo V

#### **DIGITIZING COMMERCIAL LENDING**



**John Dale**, Director, Solutions Delivery, PayNet Inc.

Learn more about digitizing financial statements to speed up delivering credit to mainstreet.

#### Demo VI

#### **PAYMENTS**



**Brady Hanna**, Executive Vice President of Financial Services, BASYS Processing

What growth strategies does your bank have in place? This session outlines six proven steps you can take to maximize your bank's merchant services revenue.

➔ 11:20 AM - 12:20 PM **Peer Exchange Session I: Opportunities**

What technologies allow a bank to grow their business? Is it through a partnership model or by providing a solution to allow the bank to better service the needs of their clients and expand their market share? How can a bank unleash the true potential of fintech companies – and in return how do technology companies expand their distribution? During Experience FinXTech, groups of bankers and fintech leaders gather to discuss topics around the opportunities that lie ahead as they work to integrate new products and innovations – in a closed-door, off-the-record setting. *(Please note, participation in the peer exchange sessions is exclusive to registered bank attendees and those companies presenting a FinXTech Connect demonstration.)*

12:20 PM - 1:30 PM **Interactive Expo + Networking Lunch**

Have lunch with key business leaders while also exploring the latest technologies changing the financial industry.

1:30 PM - 2:00 PM **What Is Your Fintech Worth?**

For many, the conversation around technology concerns a rent or partner-type consideration. But what if you wanted to buy a fintech? Be it as a bank or another technology company, the proverbial window of opportunity appears open. But for how long and what would you pay? This session examines a variety of M&A topics – beginning with how one might value a fintech in today's environment.

➔ 2:10 PM - 3:00 PM **Simulation Workshops**

**Fintech Simulation Workshop**

Michael J. Dunne, Partner, Day Pitney LLP

Michael T. Rave, Partner, Day Pitney LLP

How do fintechs find bank partners? What do fintechs need to know about working with banks? What regulations should fintechs be aware of? What differences do fintechs need to be aware of when working through culture fits? Learn answers to these questions and more during this hands-on, interactive session.

**Bank Simulation Workshop**

Once a bank decides to integrate a new technology or work with a fintech, what are the next steps? What issues need to be considered and addressed prior to integration? What are things to keep in mind as the two work together – cost, culture, talent and timing? Hear answers to these questions and more during this interactive, hands-on session.



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3:00 PM - 3:30 PM

### Interactive Expo + Refreshment Break

Enjoy snacks and refreshments as you take a hands-on look at the latest technologies and innovations.

3:30 PM - 3:50 PM

### FinXTech Connect Demonstration Sessions: **ROUND III**

Demo I



#### SECURITY

This demonstration offers solutions that focus on cybersecurity, fraud prevention, customer identification and transaction monitoring.

Demo II



#### DATA + ANALYTICS

Learn how to leverage big data, machine learning and AI to predict customer and market behavior.

Demo III



#### INTERNAL SYSTEMS

Improve efficiency and provide the infrastructure banks need to support innovation.

Demo IV



#### LENDING

Jeremy Putka, Director of Partnerships, P2Binvestor Inc.

Attend this demo to learn about modernizing your C&I lending experience.

Demo V



#### DIGITAL BANKING

How can a bank acquire and serve customers through online and mobile channels? This demonstration provides new solutions in digital banking.

Demo VI



#### PAYMENTS

Find out how this solution enables banks to offer new payment services to commercial and retail clients.

4:00 PM - 4:20 PM

### FinXTech Connect Demonstration Sessions: **ROUND IV**

Demo I



#### **REGTECH**

Is your bank looking for new solutions that track regulations and help the bank comply with them? Attend this demonstration to find out what tools are available to you and your bank.

Demo II



#### **CUSTOMER EXPERIENCE**

How can your bank improve customer engagement and remove friction from the banking experience? Find the answers during this interactive session.

Demo III



#### **SECURITY**

This demonstration offers solutions that focus on cybersecurity, fraud prevention, customer identification and transaction monitoring.

Demo IV



#### **INTERNAL SYSTEMS**

Improve efficiency and provide the infrastructure banks need to support innovation.

Demo V



#### **LENDING**

**Jorge Sun**, CEO & Co-founder, LendingFront

This session shows you how your bank can leverage technology to improve customer service and increase profitability by automating small business lending. Learn how borrowers can apply online or face to face with a streamlined application path, determine product eligibility, gather financial data and generate loan contracts in just minutes!

Demo VI



#### **PAYMENTS**

Find out how this solution enables banks to offer new payment services to commercial and retail clients.

➔ 4:30 PM - 5:30 PM

### **Peer Exchange Session II: Challenges**

This second round of peer exchange discussions allows participants the chance to share the challenges facing both banks and fintechs when working together to grow their businesses. *(Please note, participation in the peer exchange sessions is exclusive to registered bank attendees and those companies presenting a FinXTech Connect demonstration.)*

5:30 PM - 6:30 PM

### **Networking Reception**



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DAY  
TWO

**Tuesday, September 10**



**GROWING  
THE BANK**

## AGENDA

*\*Agenda subject to change*

8:00 AM - 9:00 AM

### **Breakfast**

9:00 AM - 9:10 AM

### **Welcoming Remarks**

Mika Moser, President, Bank Director & FinXTech

9:10 AM - 9:50 AM

### **How Banks and Technology Companies Can Fuel Growth and Profitability**

Pierre Naudé, CEO, nCino

Frank Sorrentino, Chairman & CEO, ConnectOne Bank

Moderated by: **Al Dominick**, CEO, Bank Director & FinXTech

Today's customers are increasingly choosing big banks to meet their demands for a personalized, seamless banking experience. While many banks rely on arduous manual processes and static back office systems to meet these expectations, the banks that embrace new technologies that automate back office functions, such as new customer onboarding, loan booking and treasury management fulfillment are finding the most success. In this session, ConnectOne Bank CEO, Frank Sorrentino, and nCino CEO, Pierre Naudé, discuss how innovative financial institutions can cultivate an internal culture of change, empower their employees with cutting edge tools and implement necessary and efficiency-creating technologies that allow them to survive and thrive in today's increasingly competitive landscape.

9:50 AM - 10:20 AM

### **Interactive Expo + Refreshment Break**

Extended refreshment breaks allow attendees the opportunity to explore and interact with the technologies featured throughout the event.

## EXPERIENCE FINXTECH CONNECT DEMONSTRATION SESSIONS

Learn what technology is available by hearing what is out there in regards to payments, lending, data and analytics, AI, wealth management and more! Each demo session follows the same 20-minute format: 5 minute demo of the product or service, 5 minutes to hear how banks can utilize the product or service, 5 minutes to hear how implementation occurs and 5 minutes for Q&A.



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10:20 AM - 10:40 AM **FinXTech Connect Demonstration Sessions: ROUND V**

Demo I



### SECURITY

This demonstration offers solutions that focus on cybersecurity, fraud prevention, customer identification and transaction monitoring.

Demo II



### DATA + ANALYTICS

Learn how to leverage big data, machine learning and AI to predict customer and market behavior.

Demo III



### COMMERCIAL LENDING

Tom Heruska, Founder & CEO, BankPoint

Learn how BankPoint seamlessly enhances your core banking system with a simple, user-friendly solution that provides dramatic improvements in efficiency and usability across the bank.

Demo IV



### CONSTRUCTION LENDING

This Experience FinXTech Connect solution focuses on helping banks grow their construction lending programs.

Demo V



### DIGITAL BANKING

How can a bank acquire and serve customers through online and mobile channels? This demonstration provides new solutions in digital banking.

Demo VI



### PAYMENTS

Find out how this solution enables banks to offer new payment services to commercial and retail clients.

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

10:50 AM - 11:10 AM **FinXTech Connect Demonstration Sessions: ROUND VI**

Demo I **REGTECH**



Is your bank looking for new solutions that track regulations and help the bank comply with them? Attend this demonstration to find out what tools are available to you and your bank.

Demo II **CUSTOMER EXPERIENCE**



How can your bank improve customer engagement and remove friction from the banking experience? Find the answers during this interactive session.

Demo III **SECURITY**



This demonstration offers solutions that focus on cybersecurity, fraud prevention, customer identification and transaction monitoring.

Demo IV **INTERNAL SYSTEMS**



Improve efficiency and provide the infrastructure banks need to support innovation.

Demo V **LENDING**



**Chris Rentner**, Director of Digital Lending, Velocity Solutions

Akouba by Velocity Solutions is a digital, cloud-based SaaS lending platform designed to process loans quickly, efficiently and profitably. This demo is for banks that want to reduce processing time, increase profitability and deliver an exceptionally streamlined borrower experience.

Demo VI **PAYMENTS**



Find out how this solution enables banks to offer new payment services to commercial and retail clients.

➔ 11:20 AM - 12:20 PM **Peer Exchange Session III: Integration**

Groups of bankers and fintech leaders gather to discuss topics around integration – before, during and after establishing the business relationship. *(Please note, participation in the peer exchange sessions is exclusive to registered bank attendees and those companies presenting a FinXTech Connect demonstration.)*



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12:20 PM - 1:45 PM

### Best of FinXTech Awards Luncheon

Participants of Experience FinXTech are invited to attend the Best of FinXTech Awards Luncheon, where the 2019 Best of FinXTech Awards finalists and winners are announced. Through the Best of FinXTech Awards, Bank Director recognizes the efforts of the financial technology solutions within FinXTech Connect that best help a financial institution grow revenues, create efficiencies or reduce risk.

1:55 PM - 2:15 PM

### FinXTech Connect Demonstration Sessions: **ROUND VII**

Demo I



#### SECURITY

This demonstration offers solutions that focus on cybersecurity, fraud prevention, customer identification and transaction monitoring.

Demo II



#### DATA + ANALYTICS

Learn how to leverage big data, machine learning and AI to predict customer and market behavior.

Demo III



#### INTERNAL SYSTEMS

Improve efficiency and provide the infrastructure banks need to support innovation.

Demo IV



#### LENDING

This Experience FinXTech Connect solution focuses on helping banks grow their commercial, consumer and mortgage lending programs.

Demo V



#### DIGITAL BANKING

How can a bank acquire and serve customers through online and mobile channels? This demonstration provides new solutions in digital banking.

Demo VI



#### PAYMENTS

Find out how this solution enables banks to offer new payment services to commercial and retail clients.

2:25 PM - 2:45 PM

### FinXTech Connect Demonstration Sessions: **ROUND VIII**

Demo I



#### **REGTECH**

Is your bank looking for new solutions that track regulations and help the bank comply with them? Attend this demonstration to find out what tools are available to you and your bank.

Demo II



#### **CUSTOMER EXPERIENCE**

How can your bank improve customer engagement and remove friction from the banking experience? Find the answers during this interactive session.

Demo III



#### **SECURITY**

This demonstration offers solutions that focus on cybersecurity, fraud prevention, customer identification and transaction monitoring.

Demo IV



#### **INTERNAL SYSTEMS**

Improve efficiency and provide the infrastructure banks need to support innovation.

Demo V



#### **LENDING**

This Experience FinXTech Connect solution focuses on helping banks grow their commercial, consumer and mortgage lending programs.

Demo VI



#### **PAYMENTS**

Find out how this solution enables banks to offer new payment services to commercial and retail clients.

↻ 2:55 PM - 3:55 PM

### **Peer Exchange Session IV: Business Relationships**

How do you find a new technology? What questions should you ask of the technology company? Of the bank? Groups of bankers and fintech leaders gather to discuss topics around how to vet and establish the right relationship in a closed-door, off-the-record setting. *(Please note, participation in the peer exchange sessions is exclusive to registered bank attendees and those companies presenting a FinXTech Connect demonstration.)*

4:05 PM - 4:45 PM

### **Keynote Presentation**

4:45 PM - 5:00 PM

### **Closing Remarks**

Al Dominick, CEO, Bank Director & FinXTech



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# EXPERIENCE FINXTECH

**Your Event For Finding The Right Technology Partner**

## VENUE

### **JW Marriott Chicago**

151 WEST ADAMS ST.

CHICAGO, IL 60603

RESERVATIONS: (877) 303-0104

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

This historic JW Marriott Chicago property offers elegantly dressed rooms, inspired amenities and superb service. The prime downtown location inside the Loop makes it easy for travelers to visit Columbia College Chicago, the University of Illinois, Millennium Park and Skydeck Chicago in the former Sears Tower and many other attractions. Beautiful rooms and suites include high ceilings, marble bathrooms, featherbeds, ample space and Wi-Fi.

## DISCOUNTED HOTEL RATE

There is a discounted hotel room rate available for Experience FinXTech attendees at the JW Marriott Chicago until August 14, 2019 or until all rooms are reserved. To reserve a room, please contact the hotel directly at (877) 303-0104 and mention "Bank Director" to receive the discounted rate of \$329/night for a standard room. Rooms are limited, so book early!

Experience **FinX**Tech<sup>®</sup>

Your Event for Finding the Right Technology Partner

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THANK  
YOU

**To Our Sponsors**





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[www.bakertilly.com](http://www.bakertilly.com)



**BankPoint** | BankPoint is a leading provider of modern bank management solutions with over fifteen years of experience helping banks simplify the way they work. The BankPoint platform seamlessly enhances your core banking system with a simple, user-friendly solution that provides dramatic improvements in efficiency and usability across the bank.

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**BASYS Processing** | BASYS Processing is bank-centric merchant services. Their processes and philosophies are built to be just like a bank. They know you depend on them to strengthen your reputation and relationships with your customers by providing remarkable service paired with ultimate flexibility and pricing. They are dedicated to working one-on-one with your customers to design the perfect solution for their business.

[www.basyspro.com](http://www.basyspro.com)



**Day Pitney LLP** | Day Pitney LLP is a full-service law firm with more than 300 attorneys in 13 offices from Boston to Miami. They represent financial institutions and fintech companies, providing advice on federal and state regulatory issues, licensing and IP matters, mergers and acquisitions, capital raising, securities law reporting, institutional finance and commercial lending, compliance, litigation matters and creditors' rights.

[www.daypitney.com](http://www.daypitney.com)



**ICBA Services Network** | The Independent Community Bankers of America® (ICBA) creates and promotes an environment where community banks flourish. Community banks channel local deposits into the main streets and neighborhoods they serve, spurring job creation, fostering innovation and fueling their customers' dreams in communities throughout America.

[www.icba.org](http://www.icba.org)



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**Integrated Legacy Solutions** | Through its flagship product, OmniView Browser, efficient business model and focused expertise, ILS delivers innovative data migrations faster and less expensive than other traditional methods. Unparalleled ILS customer service, streamlined conversion processes and the latest technology result in successful migrations from legacy systems with minimal disruption to client systems.

**[www.integratedlegacy.com](http://www.integratedlegacy.com)**



**LendingFront** | LendingFront offers a leading end-to-end small business loan origination system. The LendingFront platform allows banks to separate their small business loans from their large, commercial loans, open the online channel, automate the underwriting process and ultimately, increase overall profitability. With LendingFront, small business lending is made simple!

**[www.lendingfront.com](http://www.lendingfront.com)**



**MX Technologies Inc.** | MX, the leader in actionable financial data, enables financial institutions and fintech providers to grow faster, reduce costs, and deliver exceptional customer experience. In doing so, MX is empowering the world to become financially strong. Founded in 2010, MX is one of the fastest-growing fintech providers, partnering with more than 1,800 financial institutions and 43 of the top 50 digital banking providers.

**[www.mx.com](http://www.mx.com)**



**nCino** | nCino is the worldwide leader in cloud banking. With its Bank Operating System, built on the Salesforce platform, financial institutions can deliver the speed and digital experience that customers expect, backed by the quality and transparency that bankers need.

**[www.ncino.com](http://www.ncino.com)**



**P2Binvestor Inc.** | The P2Binvestor Bank Participation Program enables you to better serve your community by offering an ABL product to growing businesses that do not yet qualify for a traditional C&I loan without the hassle of software integration or increased staff costs.

**[www.p2bi.com](http://www.p2bi.com)**



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**PayNet Inc.** | PayNet helps commercial lenders make better decisions. They provide relevant, on-demand and secure private company credit assessments. Their proprietary information and insights improve profitability, increase access to capital for Main Street and help build a stronger economy.

**[www.paynet.com](http://www.paynet.com)**



**Plinqit** | Plinqit is a brandable, mobile first platform. Unlike other savings apps, its patent-pending Build Skills™ pays users for engaging with content, creating higher user engagement for financial institutions. Plinqit helps financial institutions connect with consumers in a meaningful, relevant way – bringing together digital customers, FI's and savings in one place.

**[www.plinqit.com](http://www.plinqit.com)**



**Porter Keadle Moore, LLC** | PKM has been focused on the needs of the financial services industry since 1977 and today serves nearly 200 clients nationwide. Through evaluating risk management systems in a way that's meaningful to management and shareholders, PKM helps clients increase long-term value through demonstrating what makes them attractive business partners and ultimately drive growth.

**[www.pkm.com](http://www.pkm.com)**



CPAs | Advisors | [www.pkm.com](http://www.pkm.com)

**Trizic, Inc.** | Trizic is a B2B technology start-up dedicated to bringing wealth management into the digital age. The Trizic team is passionately focused on developing innovative, intelligent and intuitive technology that helps banks increase their investment revenue while delivering modern interfaces that delight their customers.

**[www.trizic.com](http://www.trizic.com)**



**Velocity Solutions** | Founded in 1995 and servicing the transaction accounts of over 30 million consumers and businesses, Velocity Solutions has unparalleled expertise in using data and digitization to optimize revenue, risk and service for banks and credit unions. Velocity's solutions help drive account acquisition, manage overdraft services, digitize lending and manage compliance.

**[www.myvelocity.com](http://www.myvelocity.com)**



Brought to you by: **BankDirector**.

## RATES & REGISTRATION

**Phone:** (877) 397-7595

**Fax:** (615) 777-8449

**Website:** FinXTech.com

**E-mail:** events@bankdirector.com

**Mail:** Bank Director, 201 Summit View Drive, Suite 250, Brentwood, TN 37027

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NAME

NAME FOR BADGE

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COMPANY

TITLE

---

BANK REPRESENTING

PUBLIC/PRIVATE

---

BOARD TITLE

ASSET SIZE

---

NUMBER OF YEARS SERVING ON THE BOARD

EMAIL ADDRESS

---

ADDRESS

HOME

---

CITY

STATE

ZIP

**YES, Register Me for Experience FinXTech!**

**Early Individual Rate: \$1,495** (Expires July 12, 2019. Payment must be received by offer expiration in order to receive special rate.)

**Standard Individual Rate: \$1,695**

**YES, Register My Group for Experience FinXTech!**

**Standard Group Rate: \$1,395** (Per person for groups of 3 or more from the same financial institution; please submit a separate form for each group member.)

**Yes, Enroll My Guest in the Guest Program.**

**Guest Name:** \_\_\_\_\_

The guest fee is \$250 covers breakfast on Monday and Tuesday, 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.



## Early Rate Expires July 12, 2019!

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### Payment Information

*Please make all checks payable to DirectorCorps, Inc.*

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NAME ON CARD

CARD NUMBER

EXP. DATE

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BILLING ADDRESS IF DIFFERENT FROM PREVIOUS PAGE

### Cancellation Policy

Due to commitments and expenses, all cancellations after August 12, 2019 will be subject to a \$200 processing fee. We regret that no refunds will be given after August 26, 2019; however, substitute participants are welcomed. DirectorCorps, Inc. assumes no liability for any nonrefundable travel, hotel or related expenses incurred by registrants.

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