



Conference Agenda

All Times CST

Wednesday September 24th

**2:00PM –
4:00PM**

Pre-Conference Workshop
**ALM Hot Topics – IRR, Liquidity Risk Management,
and C-Suite Expectations**

Presented by: Chris Lomas, Daniel Bauer, Joel Updegraff | Brean Capital
CPE Credits: 2.4 Finance (Technical)

**6:00PM –
8:00PM**

Registration/Welcome/Cocktail Reception

Thursday September 25th

Morning

7:15AM

Breakfast/Registration

8:15AM

Welcome/Opening Remarks

Presented by: Brean Capital

8:30AM

General Session | Ahead of the Fed

Presented By: Scott Buchta & Conrad DeQuadros | Brean Capital
CPE Credits: 1.2 Finance (Technical)

9:30AM

Break

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9:45AM

“Around the Horn”

Explore Brief but Informative Overviews and Updates from Pertinent Product and Service Sectors (SBA/USDA Loan GICs, Reverse Mortgages, Repurchase Markets)

Presented By: Scott Taylor, Bryan Faron, Lambros Georgallas | Brean Capital
CPE Credits: 1.2 Finance (Technical)

10:45AM

Breakout Sessions: Dueling Panels

Tract A A Regulatory Perspective for Credit Unions: Subordinated Debt

Moderator: Justin Anderson, Counsel | SW&M Financial Institution Attorneys
Panelists: Pauline Belle, Former Supervisory Financial Analyst | US Dept. of Treasury
Jeremy Colvin | Brean Capital
Luis G. Dopico, Partner and Chief Economist | CUCollaborate
CPE Credit: 1.4 Finance (Technical)

Tract B Hot Topics for Community Banks: All Eyes on Stablecoin

Panelists: Kyle Thomas, Senior Advisor, Policy, and Supervision | Conference of
State Banking Supervisors (CSBS)
Daniel Wheeler | The Fintech Lawyer
CPE Credit: 1.4 Finance (Technical)

Afternoon

12:00PM

Networking Lunch

1:15PM

General Session/ Strategic Planning as a Performance Engine: From Metrics to Momentum

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Presented By: Michael Kadel, Managing Principal | OneAccord
CPE Credits: 1.2 Finance (Technical)

2:15PM

Breakout Sessions

Tract A **Risks vs. Rewards**
Taking a Deeper Dive into the Performance of MBS, CMOs and SBAs

Presented By: Scott Buchta & Mark Evans | Brean Capital
CPE Credits: 1.4 Finance (Technical)

Tract B **Product Profitability Analytics: A Tool to Drive Strategic Value**

Presented By: Ryan Fuerst, Director, Treasury Management | Kinecta FCU
CPE Credits: 1.4 Finance (Technical)

3:30PM

Break

3:45PM

Amy Downs: Hope is a Verb
Keynote

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6:00PM

Offsite Dinner
House of Cards
Lower Level, 119 3rd Ave S, Nashville, TN

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Friday September 26th

Morning

7:45AM

Breakfast

8:45AM

Value-Added Balance Sheet and Fee Income Opportunities

Presented By: **Whit Collmus**, Director of Sale Leaseback Acquisition | MOUNTAINSEED
Kim Smith, SVP | Smartfi Home Loans

CPE Credits: 1.4 Finance (Technical)

10:00AM

Break

10:15AM

Panel Discussion Secondary Market Loan Transactions- A User-Based Panel Discussion

Moderator: **Daniel Sigai** | Brean Capital

Panelists: **Rachel Strachen** | WECU
Amy Henderson | VIBRANT CU
Christie Smith | Lafayette FCU
Rocky Muniz | CU of Texas

Brian Constable | Monterey County Bank

CPE Credits 1.4 Finance (Technical)

11:30AM

Closing Remarks

Afternoon

2:00PM

Brean Sponsored Entertainment (Options/Venues TBD)