



LEADERSHIP Unplugged

MARCH 7 - 9 | PHOENIX, AZ

New Sessions Added Daily

DEPOSITS AND PAYMENTS FORUM

Monday, March 07, 2016

8:30 AM - 9:30 AM

Location:
Grand Canyon 1-3

Deep Dive Workshop

THIRST FOR DEPOSITS: NEW METRICS AND BENCHMARKS TO HELP YOUR DEPOSIT PORTFOLIO THRIVE

As loan growth outstrips deposit growth at many super regional and regional banks, there is an emerging gulf between deposit haves and have nots. Traditional approaches to measurement, strategies, and technology are no longer sufficient. See the latest innovations in metrics and benchmarks from Novantas, including actual assessments of major U.S. markets and hear how panelists are adapting.

Speaker(s):

Daniel Dent, *Consumer Deposit and Emerging Payments Manager*, First Tennessee Bank, N.A.

Andrew Frisbie, *Managing Director, Head of Products and Pricing*, Novantas, Inc.

Christopher Manderfield, *Senior Vice President*, KeyBank

Moderator: Darryl Demos, *Executive Vice President, Solutions*, Novantas, Inc.

2:45 PM - 3:55 PM

Location:
Grand Canyon 1-3

Innovation and Disruption: The Evolving Payments Landscape

From P2P and mobile payments to Visa Checkout and beyond, the payments landscape is evolving more rapidly than we've seen in decades. Learn about how tokenization, emerging fraud technologies, and the "Internet of Things" are shaping

where and how customers engage in commerce.

Speaker(s):

Bill Gajda, *Senior Vice President, Innovation & Strategic Partnerships*, Visa

Moderator: Patrick Scotto di Luzio, *Vice President, Cash Strategy, Deposits & Payments*, Charles Schwab Bank

4:00 PM - 5:00 PM

Location:
Grand Canyon 1-3

Banks + Fintech = Solutions for an Innovative Digital Payment Future

Our panel of industry experts will discuss how customer experience, product design and digital innovation lay the groundwork for staying competitive in today's fast-paced and time-sensitive payment environment. Our panel will discuss strategies for keeping your bank at top of wallet!

Speaker(s):

Tami Eckstein, *VP Innovation*, Optum Bank

Gene Kirby, *Managing Partner*, CE Solutions Group, LLC

Shawn O'Brien, *Consumer Segment Group, Executive Director*, BBVA Compass

Moderator: James Collas, *President and Chief Executive Officer*, Engage Financial Technology

Tuesday, March 08, 2016

10:10 AM - 11:10 AM

Location:
Grand Canyon 1-3

Daring to Be Different: Rethinking Checking Acquisition

Still using the same checking account growth strategy from a few years ago? Well, you shouldn't be. With fewer consumers switching banks today, banks need to rethink their checking account growth strategies. Hear from industry experts as they discuss the challenges of growing checking accounts in today's highly competitive marketplace and offer creative ways to achieve profitable, cost-effective core household growth.

Speaker(s):

Bryan Carson, *Chief Marketing Officer*, Huntington Bancshares Incorporated

Jeff Hollander, *Retail Banking Leader*, Equifax

Kevin Travis, *Managing Director*, Novantas, Inc.

Moderator: Jane Lundquist, *EVP, Director of Consumer & Small Business Banking*, Rockland Trust Company

11:40 AM - 12:40 PM

Location:
Grand Canyon 1-3

Putting Your Cardholder in Charge of Their Service Experience and Their Security

Examine how real time consumer controlled card management tools deliver enhanced customer retention, growth and loyalty, reduced operational costs and fraud loss, and significant benefits to consumer and issuer with little demand on IT resources. Hear how desktop and mobile tools that put the customer in charge of all card transactions will raise consumer spending on your brand by increasing customer loyalty, confidence and peace of mind. Our expert panel will also examine how customer tailored rules can be powerful fraud and ID protection tools that are not possible with analytics.

Speaker(s):

Robert Box, *Senior Industry Advisor, Operational Dynamics*

Steve Durney, *Senior Vice President, Issuer Relations, Ethoca*

Wayne Johnson, *Chief Executive and Executive Managing Officer, First Performance Global*

Mark Savoye, *Vice President & Senior Business Leader, Regional Lead for North America Network, Processing & Security Solutions, MasterCard Worldwide*

Moderator: Gene Kirby, *Managing Partner, CE Solutions Group, LLC*

2:40 PM - 3:40 PM

Location:
Grand Canyon 1-3

Around the World: International Payments Trends and Implications for the U.S.

As a \$1.1 trillion market globally, payments is defined by big numbers and constant innovation. Join us as we explore some key international payments trends to understand what is happening, how they are impacting the market and why it matter for the U.S. Investigate the major changes taking place in *Faster Payments*, the use cases it enables and the opportunities and threats it creates for banks. Identify the important developments in *Wallet Innovation and Digital Payments*, and discuss which propositions have been successful and what the learnings are for the US. Finally, this session will discuss what *Regulatory Action* has taken place internationally and what the implications are for U.S. banks.

Speaker(s):

Tom Dye, *Principal, The Boston Consulting Group*

Sushil Malhotra, *Partner and Managing Director, The Boston Consulting Group*

4:15 PM - 5:15 PM

Location:
Grand Canyon 1-3

Innovation that Pays: Using Jobs Theory to Unlock Growth

Companies in non-banking industries have had success in identifying and creating new features that customers value. As digital rivals launch services designed to compete with banks' core offerings, innovation in deposits will increase as will the need to determine what customers value. Join the conversation as experts discuss innovations customers value, best practices and principles, jobs theory and case examples from other industries.

Speaker(s):

Jason Green, CEO, The Cambridge Group

Taddy Hall, Senior Vice President, Innovation Practice, Nielsen

Moderator: Kevin Condon, Senior Vice President, Product Management Executive, Bank of America Corporation

Wednesday, March 09, 2016

7:50 AM - 8:50 AM

Location:
Grand Sonoran F

UDAAP: How to Plan for the Unknown

This session will explore how banks can self-assess UDAAP compliance and provide preventative maintenance to help ward off unnecessary burdens and minimize risk.

Speaker(s):

Linda Gallagher, Managing Director & Global Head of the Consumer Protection Practice, Promontory Financial Group

John Rosenfeld, Executive Vice President, Head of Everyday Banking, Citizens Financial Group

9:00 AM - 10:00 AM

Location:
Grand Canyon 1-3

High Tech Branching: Sales and Service in 2016 and Beyond

Branches have been deposit gathering machines, but will this trend continue in a changing retail environment? How can banks keep up with the latest technological trends? Hear from top innovators in branch banking to better understand what retail sales and service will look like in 2016 and beyond.

Speaker(s):

Victoria Dougherty, Director of Payment Management Solutions, Fiserv

Jeffrey Kastelic, Practice Advisor, Financial Services, Cisco Systems, Inc.

Jose Resendiz, General Manager, Digital Insight, Digital Insight, NCR Company

Moderator: Ryan Bailey, Executive Vice President, TD Bank
