



NORTHERN NEW ENGLAND
SCHOOL OF BANKING

MONDAY, OCTOBER 18-
FRIDAY, OCTOBER 22, 2021

AC DOWNTOWN/WATERFRONT HOTEL,
PORTSMOUTH, NH

AGENDA

MONDAY, OCTOBER 18

State Association Host **Chris D'Elia**, *Vermont Bankers Association*

11:45 am – 12:30 pm **BUFFET LUNCHEON**

12: 30 pm – 1:00 pm **OPENING SESSION**
Christopher D'Elia, *Registrar*

Introduction

Philosophy of the School

Plans for the Session

1: 00 pm – 1:30 pm **INTRODUCTION TO BANKING & OTHER ISSUES**
Christopher D'Elia, *Registrar*

History of Banking and Legislation

Forces Impacting the Industry

1: 30 pm – 2:30 pm **ROLE OF YOUR STATE BANKERS ASSOCIATION**
Christopher D'Elia, *President, Vermont Bankers Association*

Kristy Merrill, *President, New Hampshire Bankers Association*

Jim Roche, *President, Maine Bankers Association*

2: 30 pm – 2:45 pm **REFRESHMENT BREAK**

2:45 pm – 5:00 pm **BIRTH ORDER: WHAT'S IT GOT TO DO WITH
BUSINESS ANYWAY?**

THE ART OF MOTIVATING OURSELVES AND OTHERS

Jack Agati, *Encouraging Concepts Associates*

6:00 pm **BEER, WINE & CHEESE RECEPTION**

6:30 pm **DINNER**



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TUESDAY, OCTOBER 19

State Association Hostess **Kristy Merrill**, *New Hampshire Bankers Association*

7:30 am – 8:15 am **BREAKFAST BUFFET**

8:15 am – 9:45 am **ECONOMIC DEMOGRAPHICS**
Brian Gottlob, *PolEcon Research*

9:45 am – 10:00 am **BREAK**

10:00 am – 12:00 pm **FUNDAMENTALS OF LENDING**
(Includes Time for Case Study Analysis)
Charlie Dowd, *VP Residential Mortgage Sales, Meredith Village Savings Bank*
Terrie McQuillen, *SVP, Sr. Portfolio Manager, Merrimack County Savings Bank*
James Gallagher, *SVP, Sr. Commercial Lending Officer, Merrimack County Savings Bank*

12:00 pm – 1:00 pm **LUNCH**

1:00 pm – 2:30 pm **FRAUD, CYBERCRIME, SECURITY**
John H. Rogers, *CISSP, Monarch Information Security Consultants*

2:30 pm – 2:45 pm **REFRESHMENT BREAK**

2:45 pm – 4:15 pm **MARKETING FOR THE FUTURE**
Linda Varrell, *Broadreach Public Relations*

4:15 pm – 4:30 pm **BREAK**

4:30 pm – 5:45 pm **THE FUTURE OF FINANCIAL SERVICES**
Matt Putvinski, *CPA, CISA, CISSP, Wolf & Company, P.C.*

6:30 pm **DINNER**

7:30 pm **TEAM BUILDING/NETWORKING EXPERIENCE**



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WEDNESDAY, OCTOBER 20

State Association Host **Jim Roche**, *Maine Bankers Association*

7:30 am – 8:15 am **BREAKFAST BUFFET**

8:15 am – 10:15 am **BANK FINANCIAL STATEMENTS/ROLE OF THE CFO**
Tom Zuke, *Executive Vice President/ Chief Financial Officer & Treasurer*
Kennebunk Savings Bank

10:15 am – 10:30 am **BREAK**

10:30 am – 11:45 am **ASSET LIABILITY MANAGEMENT**
Tom Zuke, *Executive Vice President/ Chief Financial Officer & Treasurer*
Kennebunk Savings Bank

11:45 am – 12:30 pm **LUNCH**

12:30 pm – 2:00 pm **BUSINESS DEVELOPMENT: ACQUIRING, RETAINING
AND ATTRACTING CUSTOMERS**
Chantal Upton, *Customer Care Manager, Partners Bank*

2:00 pm – 2:15 pm **BREAK**

2:15 pm – 3:15 pm **INTRODUCTION TO TRUST SERVICES, WEALTH
MANAGEMENT AND INSURANCE**
Valerie Nevel, Esq., *Senior Financial Advisor & Fiduciary Consultant,*
Ledyard Financial Advisors

3:15 pm – 3:30 pm **REFRESHMENT BREAK**

3:30 pm – 5:30 pm **CEO PANEL DISCUSSION**
Tony McKim, *President & CEO, First National Bank*
Joan Gile, *President, Piscataqua Savings Bank*
David Silverman, *President & CEO, Union Bank*

DINNER ON YOUR OWN



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THURSDAY, OCTOBER 21

State Association Host **Kristy Merrill**, *New Hampshire Bankers Association*

7:30 am – 8:15 am **BREAKFAST BUFFET**

8:15 am – 9:45 am **FROM SUPERVISOR TO LEADER**
David Ciullo, *CEO, Career Management Associates*

9:45 am – 10:00 am **BREAK**

10:00 am – 12:30 pm **FROM SUPERVISOR TO LEADER (continued)**
David Ciullo, *CEO, Career Management Associates*

12:30 pm – 1:30 pm **LUNCH**

1:30 pm – 3:00 pm **HUMAN RESOURCES ISSUES IMPACTING MANAGERS**
Anne Jenness, *Attorney, Gallaher, Callahan & Gartrell, PC*

3:00 pm – 3:15 pm **REFRESHMENT BREAK**

3:15 pm – 5:00 pm **ERM, CRA & COMPLIANCE**
Michael Gallagher, *EVP & Chief Risk Officer*
Enterprise Bank

6:00 pm **DINNER**



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FRIDAY, OCTOBER 22

State Association Host **Chris D'Elia**, *Vermont Bankers Association*

7:30 am – 8:30 am **BREAKFAST BUFFET**

8:30 am – 10:00 am **PUBLIC SPEAKING**
Cristy Beemer, *University of New Hampshire*

10:00 am – 10:15 am **BREAK**

10:15 am – 12:00 pm **WRITTEN COMMUNICATION SKILLS**
Cristy Beemer, *University of New Hampshire*

12:00 pm **ASSIGNMENTS, WRAP UP AND COLLECT
EVALUATIONS**

12:00 pm **BOX LUNCHES** (*take it for the road or eat before you leave!*)
