

2023 SENIOR LEADERS & DIRECTORS FORUM

MAY 11 | 8:00 AM - 3:00 PM | HILTON GARDEN INN AUBURN RIVERWATCH, AUBURN

SPEAKER BIOS



Marty Mosby, ICBA Securities/Stifel

Marty joined Stifel through the merger with Vining Sparks in 2022. He has been a bank research analyst for over 10 years. He utilizes his past experience of managing a regional bank to cover 20 of the largest U.S. banks. Prior to covering banks, Marty was an executive manager at First Horizon National Corporation where over his 20-year career he served as Chief Financial Officer, Head of Investor Relations and Strategic Planning, ALCO Chairperson and Chief Economist. He was ranked first by Integrity Research and Investors' performance, won Bank Analyst Annual Best Investor Relations at a Mid-Cap Bank award twice and was recognized by Investor Relations Magazine for one of the best Roadshows of any mid-sized company.



Elizabeth Hamilton-Guarino, Best Ever You

Elizabeth is the Chief Executive Officer of Compliance4 and Founder of The Best Ever You Network. She is the author of the award-winning and best-selling books *The Change Guidebook – How to Align Your Heart, Truths, and Energy to Find Success in All Areas of Your Life* and *PERCOLATE - Let Your Best Self Filter Through*. Elizabeth is the recipient of the 2019 Excellence in Finance — Leaders award for her significant contribution towards the financial sector from FiNext. Elizabeth is a member of the Forbes Business Council and serves as a Leadership Advisor for the Olympia Snowe Women's Leadership Institute.



Meredith Piotti, Wolf & Company, P.C.

Merry is a Principal in Wolf's Advisory Group and serves on the Firm's Internal Audit Team, where she provides internal audit, consulting, and risk management services to clients. She also oversees the Firm's data analytics team—combining operational and technological knowledge to perform model validation reviews, conversion testing, and incorporate analytics into audits. With over 13 years of experience in the field, Merry works with clients to provide full internal audit services, supplement internal audit capabilities, assist with specialized reviews, and develop risk-based audit plans with outsourced and co-sourced internal audit departments.

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SPEAKER BIOS CONTINUED



Erica Torres, Wolf & Company, P.C.

Erica is a Principal in Wolf's Advisory Group, where she manages the development and execution of compliance reviews and training for financial institutions. She provides expert analysis of federal and state regulation compliance to organizations including state chartered banks, national banks, savings and loan associations, and credit unions. Erica has over 15 years of experience in the banking industry, working with institutions across New England ranging in asset size from \$50 million to over \$250 billion. Prior to joining Wolf, she worked at TD Bank.



Marianne Hatheway, FDIC

Marianne is a Deputy Regional Director for the Division of Risk Management Supervision (RMS) in the FDIC's New York Region. She has supervisory responsibility for banks in New England, Maryland, Delaware, District of Columbia, and Puerto Rico. She received a Bachelor of Science in Business Management from Boston College in Chestnut Hill, Massachusetts, and earned a Master's Degree in Business Administration from Babson College in Babson Park, Massachusetts.



Lori Bittner, OCC

Lori is an Assistant Deputy Comptroller in the U.S. Treasury Office of the Comptroller of the Currency's (OCC) Boston Office. She manages a team of professionals and supervises a portfolio of federally chartered banks across New England. She has 19 years of experience with the OCC and over a decade of private sector consulting in senior leadership positions. Prior to Boston, Lori worked in the OCC's large bank division responsible for Recovery and Resolution Planning for the nation's largest, globally significant banks. She rejoined the OCC in 2012 as the Special Assistant to the Senior Deputy Comptroller for Large Banks engaged in implementing agency policies and procedures. Lori is a Commissioned National Bank Examiner and a credentialed Federal Thrift Regulator.