

2024 Bank Expo Schedule of Events

April 4, 2024

| Who Should Attend | Start Time | End Time | Description | Sponsored By | Location |
|---|------------|----------|--|------------------------------|--------------------------------------|
| All Attendees | 9:00AM | 9:45AM | Registration and Continental Breakfast | | Lobby Foyer, Vermont & New Hampshire |
| All Attendees | 9:45AM | 10:45AM | Kickoff CEO Town Hall | | Vermont & New Hampshire |
| Sales/Relationship Management Professionals | 11:00AM | 11:45AM | GROW Breakout: <i>Sales DNA of an Effective Banker: The 21 Sales Core Competencies</i> | Anthony Cole Training | Massachusetts |
| Human resources/L&D/Training Professionals | 11:00AM | 11:45AM | DEVELOP Breakout: <i>Retaining Talent During Economic Uncertainty</i> | Career Management Associates | Rhode Island |
| Cybersecurity and IT Professionals | 11:00AM | 11:45AM | SECURE Breakout: <i>Artificial Intelligence: It's impact on Risk, Policy, and Banking Operations</i> | Monarch | Connecticut |
| Compliance Professionals | 11:00AM | 11:45AM | COMPLY Breakout: <i>Artificial Intelligence, Models, and Algorithms: Compliance Implications for the Financial Services Industry</i> | Deer-Brook | Cumberland/Kennebec/Lincoln |
| Branch Operations Professionals | 11:00AM | 11:45AM | FRONTLINE Breakout: <i>Active shooter, the new robbery, and general acts of violence</i> | Blue-U | Oxford/Somerset |
| All Attendees | 11:45AM | 1:00PM | Luncheon and General Session: <i>How Banks Are Preparing for AI and Utilizing AI Tools with WipFli</i> | | Vermont & New Hampshire |
| Sales/Relationship Management Professionals | 1:00PM | 1:45PM | GROW Breakout: <i>Going Fishing: Build Your Sales Prospecting Plan</i> | Anthony Cole Training | Massachusetts |
| Human resources/L&D/Training Professionals | 1:00PM | 1:45PM | DEVELOP Breakout: <i>Banking on Excellence: Unlocking the Keys to Effective FMLA and ADA Leave Management</i> | Career Management Associates | Rhode Island |
| Cybersecurity and IT Professionals | 1:00PM | 1:45PM | SECURE Breakout: <i>Access & Authentication. How AIBE's replacement issued in 2021, and the newest technologies might affect your strategies, risk management, and monitoring programs</i> | Monarch | Connecticut |
| Compliance Professionals | 1:00PM | 1:45PM | COMPLY Breakout: <i>Open Banking - Compliance Considerations Under CFPB's Rulemaking</i> | Deer-Brook | Cumberland/Kennebec/Lincoln |
| Branch Operations Professionals | 1:00PM | 1:45PM | FRONTLINE Breakout: <i>Instant Payment Rails- How similar are they and what governs these transactions?</i> | NEACH | Oxford/Somerset |
| All Attendees | 1:45PM | 2PM | Refresh Break | | Ballroom Foyer |
| Sales/Relationship Management Professionals | 2:00PM | 2:45PM | GROW Breakout: <i>Expanding the Relationship with Stewardship</i> | Anthony Cole Training | Massachusetts |
| Human resources/L&D/Training Professionals | 2:00PM | 2:45PM | DEVELOP Breakout: <i>Importance of an Accountability Mindset</i> | Career Management Associates | Rhode Island |
| Cybersecurity and IT Professionals | 2:00PM | 2:45PM | SECURE Breakout: <i>Third-Party Relationships Risk Management – Considerations arising from the 2023 Interagency Guidance</i> | Monarch | Connecticut |
| Compliance Professionals | 2:00PM | 2:45PM | COMPLY Breakout: <i>Enhancing Incident Respose Plans to accommodate FIL-74-2021 Computer-Security Incident Notification Final Rule</i> | Deer-Brook | Cumberland/Kennebec/Lincoln |

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| Branch Operations Professionals | | | FRONTLINE Breakout: <i>INVITED Elder Fraud Prevention with ABA</i> | | Oxford/Somerset |
| All Attendees | 2:45PM | 3:00PM | Refresh Break | | Foyer |
| Sales/Relationship Management Professionals | 3:00PM | 3:45PM | GROW Breakout: <i>High Touch Coaching in a High-Tech, Remote World</i> | Anthony Cole Training | Massachusetts |
| Human resources/L&D/Training Professionals | 3:00PM | 3:45PM | DEVELOP Breakout: <i>Ice Breakers, Team Building Activities & Energizers</i> | Career Management Associates | Rhode Island |
| Cybersecurity and IT Professionals | 3:00PM | 3:45PM | SECURE Breakout: <i>Cybersecurity Panel Discussion. Primary Topic: Microsoft 365. Service Provider and Cybersecurity Experts join fellow bankers to discuss the wide ranging issues of M365. Topics include secure configuration/engineering, licensing, tool-set selection, and cybersecurity.</i> | Monarch | Connecticut |
| Compliance Professionals | 3:00PM | 3:45PM | COMPLY Breakout: <i>BSA/AML & GLBA: Maximizing Compliance Effectiveness Leveraging Risk Management Practices</i> | Deer-Brook | Cumberland/Kennebec/Lincoln |
| Branch Operations Professionals | | | FRONTLINE Breakout: <i>INVITED Quality Control and Quality Assurances Tools and Processes</i> | | Oxford/Somerset |
| All Attendees | 3:45PM | 5:00PM | Closing Remarks, Happy Hour, Networking | | Vermont & New Hampshire |