

Monday – June 5, 2023

TIME	HARBOR VIEW BALLROOM (Lobby Level) CORE SESSION TRACK	QUINCY ROOM (Lobby Level) CREDIT UNION TRACK	SALON D MODEL RISK MANAGEMENT & VALIDATION TRACK	SALON A BALANCE SHEET MANAGEMENT TRACK	SALON G BALANCE SHEET MANAGEMENT TRACK	SALON J BALANCE SHEET MANAGEMENT TRACK
8:00–8:50	Current Trends & Conference Overview Matt Pieniazek – DCG Grand Ballroom ◆ 1 CPE Credit					
9:00–10:00	Risk/Return Trade-Offs & Current Issues in Balance Sheet Management <i>Jeff Reynolds – DCG</i> ✖ 1 CPE Credit	Navigating Through a Perfect Storm of Liquidity Pressures <i>Darnell Canada & Ryan Gilles – DCG</i> ✖ 1 CPE Credit	Creating Proper Model Development Documentation <i>Mark Haberland & Ruben Yzaguirre – DCG</i> ✖ 1 CPE Credit	Investment Opportunities & Pitfalls in the Current Rate Environment <i>Larry Miele – Wells Fargo Advisors</i> ● 1 CPE Credit	What Comes Next in “This” Recession? Lessons in Credit and Risk Management <i>Justin Bakst & John Demeritt – DCG</i> ✖ 1 CPE Credit	Maintaining Your CECL Model <i>Mike Guglielmo & Chase Ogden – DCG</i> ▲ 1 CPE Credit
10:15–11:15	Measuring & Managing Liquidity – <i>Keri Crooks – DCG</i> ✖ 1 CPE Credit		ALM Panel: Model Evolution and Performance <i>David Hough – FIS, Chris Maclin – Empyrean, and Jerry Clark – ZM Moody’s</i> ✖ 1 CPE Credit	Managing Interest Rate Risk with Derivatives: Timely Case Studies <i>Todd Cuppia & Dave Sweeney – Chatham Financial</i> ✖ 1 CPE Credit	Lending in a Sea of Uncertainty: Principles for Today and Every Day <i>Matt Pieniazek & Zach Zoia – DCG</i> ✖ 1 CPE Credit	Balance Sheet Management Strategies to Consider and Avoid while Riding this Rollercoaster of an Environment <i>Steve Boselli & Frank Farone – DCG</i> ✖ 1 CPE Credit
11:30–12:30 PM	Peer Group Breakout Sessions ✖ 1 CPE Credit					
1:30–2:30	Measuring & Managing Interest Rate Risk <i>Darnell Canada & Bob Lallo – DCG</i> ✖ 2 CPE Credits		Liquidity Risk: Leading Practices in Stress Testing, Assumption Support, and Backtesting <i>Mike Guglielmo & Tim Daniels – DCG</i> ✖ 1 CPE Credit	We Can Predict That? Deposit Strategy Using Advanced Analytics <i>Justin Bakst & Jon Weiner – DCG</i> ✖ 1 CPE Credit	Commercial Real Estate Update: Where Are We Now, and Where Are We Going? <i>Aaron Jodka – Colliers</i> ✖ 1 CPE Credit	Banking-as-a-Service: Understanding the Challenges & Opportunity <i>Elena Pierce – CCG</i> ✖ 1 CPE Credit
2:45–3:45		Consumer Credit Outlook <i>David Fieldhouse – Moody’s</i> ✖ 1 CPE Credit	Emerging Best Practices for Community Bank CECL Models <i>Chase Ogden – DCG</i> ✖ 1 CPE Credit	Deposit Strategies in a Historically Competitive Environment <i>Billy Guthrie & Joe Kennerson – DCG</i> ✖ 1 CPE Credit	Liquidity & Wholesale Funding <i>Keri Crooks & Ryan Gilles – DCG</i> ✖ 1 CPE Credit	Regulatory Hot Buttons and Ways to Mitigate Risk <i>Heather Eastep & John Delionado – Hunton Andrews Kurth</i> ✖ 1 CPE Credit
4:00–5:00	Keynote Address – Dr. Michelle Rozen Grand Ballroom ◆ 1 CPE Credit					

- ▲ Accounting
- + Economics
- ✖ Management Services

- ◆ Business Management & Organization
- Finance
- Statistics

Tuesday – June 6, 2023

TIME	HARBOR VIEW BALLROOM (Lobby Level) CORE SESSION TRACK	QUINCY ROOM (Lobby Level) CREDIT UNION TRACK	SALON D MODEL RISK MANAGEMENT & VALIDATION TRACK	SALON A BALANCE SHEET MANAGEMENT TRACK	SALON G BALANCE SHEET MANAGEMENT TRACK	SALON J BALANCE SHEET MANAGEMENT TRACK
8:30–9:30	Economic Forecast – Chris Low Grand Ballroom + 1 CPE Credit					
9:45–10:45	Developing & Documenting Balance Sheet Management Strategies <i>Keith Reagan & Patrick Ward – DCG</i> ✖ 2 CPE Credits	Investment Selection In Light of Credit Union Balance Sheet Needs <i>Larry Miele – Wells Fargo Advisors</i> ● 1 CPE Credit	Credit Risk: CECL, Stress Testing, and Where We Go from Here <i>Sam Chen & Joe Montalbano – DCG</i> ■ 1 CPE Credit	Managing Interest Rate Risk with Derivatives: Timely Case Studies <i>Todd Cuppia & Dave Sweeney – Chatham Financial</i> ✖ 1 CPE Credit	Lending in a Sea of Uncertainty: Principles for Today and Every Day <i>Matt Pieniazek & Zach Zoia – DCG</i> ✖ 1 CPE Credit	Regulatory Hot Buttons and Ways to Mitigate Risk <i>Heather Eastep & John Delionado – Hunton Andrews Kurth</i> ✖ 1 CPE Credit
11:00–12:00			MRM Panel: Practitioners' Insights <i>Nick Kapatos – Allegiance Bank, Jeff Prella – Cadence Bank, & Philip Stalcup – Origin Bank</i> ✖ 1 CPE Credit	What Comes Next in "This" Recession? Lessons in Credit and Risk Management <i>Justin Bakst & John Demeritt – DCG</i> ✖ 1 CPE Credit	Deposit Strategies in a Historically Competitive Environment <i>Billy Guthrie & Joe Kennerson – DCG</i> ✖ 1 CPE Credit	Balance Sheet Management Strategies to Consider and Avoid while Riding this Rollercoaster of an Environment <i>Steve Boselli & Frank Farone – DCG</i> ✖ 1 CPE Credit
1:00–2:00	Balance Sheet Management Strategies Case Studies <i>Mike Carney & Vinny Clevenger – DCG</i> ✖ 2 CPE Credits		BSA/AML Model Evolution in a Rapidly Changing World: How Recent Changes in Technology and Current Events Are Affecting Our BSA/AML programs <i>Sam Chen & Debb Gordon – DCG</i> ■ 1 CPE Credit	Investment Opportunities & Pitfalls in the Current Rate Environment <i>Larry Miele – Wells Fargo Advisors</i> ● 1 CPE Credit	Liquidity & Wholesale Funding <i>Keri Crooks & Ryan Gilles – DCG</i> ✖ 1 CPE Credit	Banking-as-a-Service: Understanding the Challenges & Opportunity <i>Elena Pierce – CCG</i> ✖ 1 CPE Credit
2:15–3:15		In Search of the Holy Grail: Prioritizing Industry and Regulatory Hot Topics <i>Mike Mitchell – DCG</i> ✖ 1 CPE Credit	MRM Leads to Confident Decision Making <i>Mark Haberland & Chris Paige – DCG</i> ✖ 1 CPE Credit	We Can Predict That? Deposit Strategy Using Advanced Analytics <i>Justin Bakst & Jon Weiner – DCG</i> ✖ 1 CPE Credit	Commercial Real Estate Update: Where Are We Now, and Where Are We Going? <i>Aaron Jodka – Colliers</i> ✖ 1 CPE Credit	Maintaining Your CECL Model <i>Mike Guglielmo & Chase Ogden – DCG</i> ▲ 1 CPE Credit

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