

Tuesday – June 7, 2022

TIME	CORE SESSION TRACK	BALANCE SHEET MANAGEMENT TRACK	MODEL RISK MANAGEMENT TRACK
11:30–12:50	Opening Remarks & Economic Update Matt Pieniazek – DCG & Lacy Hunt – Hoisington Investment Management Company		
12:50–1:00	Break		
1:00–1:50	Risk/Return Trade-Offs & Current Issues in Balance Sheet Management Jeff Reynolds – DCG	Crypto Banking: Make Sure Your Head Is Not in The Sand Patrick Sells - NYDIG	CECL Model Updates “After” COVID-19 Chase Ogden – DCG
1:50–2:00	Break		
2:00–2:50	Measuring & Managing Liquidity Keri Crooks – DCG	Practical Derivative Strategies for Financial Institutions Todd Cuppia & Dave Sweeney – Chatham Financial	Solutions for BSA/AML Challenges in the Era of COVID Sam Chen – DCG
2:50–3:00	Break		
3:00–3:50	Measuring & Managing Interest Rate Risk Darnell Canada & Bob Lallo – DCG	Preparing for Rising Rates: DCG’s Lessons in Deposit Forecasting Justin Bakst, Billy Guthrie & Jonathon Weiner – DCG	Model Risk Management and Validation Update/Hot Topics Mike Guglielmo & Brian Hershberger – DCG
3:50–4:00		Break	
4:00–4:50		When Environmental and Financial Risks Collide Tom Doe – Municipal Market Analytics, Inc. Evan Kodra – ICE Data Services	The Right Validation Can Make All the Difference Mark Haberland – DCG

38th Annual Balance Sheet & Model Risk Management Conference



Wednesday – June 8, 2022

TIME	CORE SESSION TRACK	BALANCE SHEET MANAGEMENT TRACK	MODEL RISK MANAGEMENT TRACK
12:00–12:50	Developing & Documenting Balance Sheet Management Strategies Keith Reagan & Patrick Ward – DCG	Investment Opportunities and Traps in a Fed Tightening Environment Larry Miele – Wells Fargo Advisors	Credit Risk: DFAST, CECL, and Where We Go from Here Joe Montalbano – DCG
12:50–1:00		Break	
1:00–1:50		Unlocking Valuable Strategic Lending Insights Matt Pieniazek & Zach Zoia – DCG	Optimizing Your Data: How Big Data Is Shaping the Banking Industry Sam Chen & Chase Ogden – DCG
1:50–2:00	Break		CREDIT UNION TRACK
2:00–2:50	Balance Sheet Management Strategies Case Studies Mike Carney & Vinny Clevenger – DCG	CECL Uncovered: Strategic Risks and C-Suite Insights Mike Guglielmo – DCG	Effective Bond Selection for Credit Unions Larry Miele – Wells Fargo Advisors
2:50–3:00		Break	
3:00–3:50		How Effective is Your Digital Banking Strategy? Dale Oberkfell – Oberkfell Financial Advisors Laura Spiekerman – Alloy	The NEV Sup Test “Perfect Storm” Has Arrived with a Vengeance Frank Farone – DCG

Thursday – June 9, 2022

TIME	BALANCE SHEET MANAGEMENT TRACKS		CREDIT UNION TRACK
12:00–12:50	The Capital Conundrum: Capital Planning and Credit Trends Post-COVID-19 Justin Bakst & John Demeritt – DCG	Not Only Did They Move Your Cheese, They Also Changed the Rules! Keith Hughey – J. Keith Hughey Co.	Are You Ready for Rising Rates? Mike Mitchell – DCG
Break			
1:00–1:50	Finding Value in the MBS Market Tony Albrecht – Advanced Capital Group	Deposit Strategy Outlook: Preparing for the Next Cycle Billy Guthrie & Joe Kennerson – DCG	Strategic Loan Participations: New Trends & Hot Topics Ian Lampl – Loan Street
Break			
2:00–2:50	Balance Sheet Management Strategies as the New Rate Cycle Emerges! Steve Boselli & Frank Farone – DCG	BONUS MRM TRACK SESSION Fair Lending in Flux: How Changing Demographics Affect Our Institutions Sam Chen & Debb Gordon – DCG	Three Success Stories For High-Performing Credit Unions as Rates Rise Zach Zoia – DCG
Break			
3:00–4:00	Keynote Address – The Fundamentals of Winning Jason Kuhn – Stonewall Solutions		
4:00–4:05	Closing Remarks Matt Pieniazek – Darling Consulting Group		

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