

# 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	<b>Current Trends &amp; Conference Overview</b> Matt Pieniasek – 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	In Search of the Holy Grail: Prioritizing Industry and Regulatory Hot Topics <i>Mike Mitchell – DCG</i>  ✖ 1 CPE Credit	Creating Proper Model Development Documentation <i>Mark Haberland &amp; 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 &amp; John Demeritt – DCG</i>  ✖ 1 CPE Credit	Maintaining Your CECL Model <i>Mike Guglielmo &amp; 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 &amp; Dave Sweeney – Chatham Financial</i>  ✖ 1 CPE Credit	Lending in a Sea of Uncertainty: Principles for Today and Every Day <i>Matt Pieniasek &amp; 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 &amp; Frank Farone – DCG</i>  ✖ 1 CPE Credit
11:30–12:30 PM	<b>Peer Group Breakout Sessions</b> ✖ 1 CPE Credit					
1:30–2:30	Measuring & Managing Interest Rate Risk <i>Damell Canada &amp; Bob Lallo – DCG</i>  ✖ 2 CPE Credits		Liquidity Risk: Leading Practices in Stress Testing, Assumption Support, and Backtesting <i>Mike Guglielmo &amp; Tim Daniels – DCG</i>  ✖ 1 CPE Credit	We Can Predict That? Deposit Strategy Using Advanced Analytics <i>Justin Bakst &amp; 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 <i>Speaker TBD</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 &amp; Joe Kennerson – DCG</i>  ✖ 1 CPE Credit	Liquidity & Wholesale Funding <i>Patrick Ward – DCG</i>  ✖ 1 CPE Credit	Regulatory Hot Buttons and Ways to Mitigate Risk <i>Heather Eastep &amp; John Delionado – Hunton Andrews Kurth</i>  ✖ 1 CPE Credit
4:00–5:00	<b>Keynote Address – Dr. Michelle Rozen</b> 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	<b>Economic Forecast – Chris Low</b> Grand Ballroom + 1 CPE Credit					
9:45–10:45	Developing & Documenting Balance Sheet Management Strategies <i>Keith Reagan &amp; Patrick Ward – DCG</i>  ✖ 2 CPE Credits	Navigating Through a Perfect Storm of Liquidity Pressures <i>Darnell Canada &amp; Ryan Gilles – DCG</i>  ✖ 1 CPE Credit	Credit Risk: CECL, Stress Testing, and Where We Go from Here <i>Sam Chen &amp; Joe Montalbano – DCG</i>  ■ 1 CPE Credit	Managing Interest Rate Risk with Derivatives: Timely Case Studies <i>Todd Cuppia &amp; Dave Sweeney – Chatham Financial</i>  ✖ 1 CPE Credit	Lending in a Sea of Uncertainty: Principles for Today and Every Day <i>Matt Pieniazek &amp; Zach Zoia – DCG</i>  ✖ 1 CPE Credit	Regulatory Hot Buttons and Ways to Mitigate Risk <i>Heather Eastep &amp; John Delionado – Hunton Andrews Kurth</i>  ✖ 1 CPE Credit
11:00–12:00		Investment Selection In Light of Credit Union Balance Sheet Needs <i>Larry Miele – Wells Fargo Advisors</i>  ● 1 CPE Credit	MRM Panel: Practitioners' Insights <i>Nick Kapatos – Allegiance Bank, Jeff Prella – Cadence Bank, &amp; Philip Stalcup – Origin Bank</i>  ✖ 1 CPE Credit	What Comes Next in "This" Recession? Lessons in Credit and Risk Management <i>Justin Bakst &amp; John Demeritt – DCG</i>  ✖ 1 CPE Credit	Deposit Strategies in a Historically Competitive Environment <i>Billy Guthrie &amp; 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 &amp; Frank Farone – DCG</i>  ✖ 1 CPE Credit
1:00–2:00	Balance Sheet Management Strategies Case Studies <i>Mike Carney &amp; 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 &amp; 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>Patrick Ward – DCG</i>  ✖ 1 CPE Credit	Banking as a Service <i>Speaker TBD</i>  ✖ 1 CPE Credit
2:15–3:15			MRM Leads to Confident Decision Making <i>Mark Haberland &amp; Chris Paige – DCG</i>  ✖ 1 CPE Credit	We Can Predict That? Deposit Strategy Using Advanced Analytics <i>Justin Bakst &amp; 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 &amp; Chase Ogden – DCG</i>  ▲ 1 CPE Credit

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