



# Bank Presidents Seminar

— TWENTY TWENTY-TWO —

January 11-14, 2022 | The Montage Resort  
Laguna Beach, California





# Bank Presidents Seminar

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Bank Presidents Seminar is the only Western Bankers program exclusively for bank presidents and CEOs.

Senior leaders of Western region banks are invited to attend and share in informative sessions and networking opportunities to discuss the ever-changing landscape of the financial services arena at the beautiful Montage Resort in Laguna Beach.

For the first time in 2022, we are opening this event up to non-member bank executives for a chance to experience one of the association's premier events.

## Seminar Support

### GENERAL QUESTIONS AND SPONSORSHIP INFORMATION

- ▶ For more information, or to obtain a complete list of available sponsorship opportunities and sponsorship pricing for this event, please contact Jennifer Benson at [jbenson@westernbankers.com](mailto:jbenson@westernbankers.com). Additional sponsorship information can also be found on our website at [Westernbankers.com/BPS22](https://www.westernbankers.com/BPS22)

### REGISTRATION QUESTIONS

- ▶ For questions specific to registration for the 2022 Bank President's Seminar, please contact Gina Titus at [gtitus@westernbankers.com](mailto:gtitus@westernbankers.com).



# AGENDA AT-A-GLANCE

## Tuesday, January 11

12:00 PM – 3:00 PM **Western Bankers Executive Committee Meeting**

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5:00 PM – 8:00 PM **Western Bankers and Banker Benefits Board Reception and Dinner**

## Wednesday, January 12

10:00 AM – 6:15 PM **Registration Open**

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10:00 AM – 12:00 PM **Western Bankers Board of Directors Meeting**

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12:00 PM – 1:30 PM **Western Bankers Past Chairman's Lunch**

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1:30 PM – 3:00 PM **Banker Benefits Board Meeting**

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5:00 PM – 6:15 PM **Welcome Reception**

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*Evening Open for Vendor Dinners*

## Thursday, January 13

8:00 AM – 4:30 PM **Registration Open**

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8:00 AM – 9:00 AM **Breakfast**

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9:00 AM – 10:15 AM

### **WELCOME AND OPENING REMARKS**

- ▶ Steve Andrews, President and CEO, Western Bankers

### **OPENING KEYNOTE GENERAL SESSION: Economy: Where Do We Go From Here? How to Overcome, Adapt and Thrive!**

- ▶ Andrew Busch, Economist; Former CMIO, U.S. Government; Author



# Thursday, January 13 *Continued...*

10:15 AM – 10:30 AM **Refreshment Break**

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10:30 AM – 11:30 AM **LEARNING SESSIONS: SERIES 1**

**Cryptocurrencies: A Banker's Friend or Foe?**

- ▶ Scott Goodwin, Principal, Wolf & Company, P.C.

**Key Cybersecurity Trends in Banking 2022 and Beyond**

- ▶ Mike McWilliams, Chief Revenue Officer and William Hoffman, Chief Information Security Officer — Reliable IT
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11:30 AM – 1:00 PM **Luncheon**

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1:00 PM – 2:00 PM **LEARNING SESSIONS: SERIES 2**

**Next Generation Banking: Innovations in Banking Technology**

- ▶ Jamison Sites, Senior Manager, Tax Services and Bennett Moore, Senior Innovation Architect — RSM US LLP

**Post Pandemic Liquidity – The Challenges Have Changed But Don't Take Your Eye Off The Ball**

- ▶ Mark Haberland, Managing Director, Darling Consulting Group
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2:15 PM – 3:15 PM **LEARNING SESSIONS: SERIES 3**

**Integration to the CORE**

- ▶ Eric Devine, President and Nick Perfido, Executive Vice President — Vitex

**Value Creation for Privately and Closely Held Community Banks: A Discussion on M&A and Capital Raising**

- ▶ Andrew Underwood, Managing Director, The Financial Institutions Group, PNC Capital Markets LLC
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3:15 PM – 3:30 PM **Refreshment Break**

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3:30 PM – 4:30 PM **GENERAL SESSION: U.S. and California Economic Outlook**

- ▶ Chris Thornberg, PhD, Founding Partner, Beacon Economics
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5:00 PM – 6:00 PM **Reception**

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6:00 PM – 8:00 PM **Dinner & Entertainment**

# Friday, January 14

7:00 AM – 8:00 AM

## Breakfast

8:00 AM – 12:30 PM

## Registration Open

8:00 AM – 9:00 AM

### GENERAL SESSION: A Fireside Chat with Seasoned West Coast Acquirers Moderated by Keefe, Bruyette & Woods

- ▶ Jeff Wishner, Managing Director; Aaron Axton, Managing Director; and Joe Gulash, Managing Director — Keefe, Bruyette & Woods, Inc., a Stifel Company
- ▶ Rick Smith, President & CEO, Tri Counties Bank
- ▶ Dave Brager, President & CEO, Citizens Business Bank
- ▶ Clint Stein, CEO, Columbia Banking System, Inc.

9:10 AM – 10:10 AM

### LEARNING SESSIONS: SERIES 4

#### Sales Leadership: The Four We are For

- ▶ Mark Trinkle, Chief Growth Officer, Anthony Cole Training Group, LLC

#### Put the Gloves on! Leveraging Customer Data to Maximize NII

- ▶ Matt Mingenback, Vice President of Sales, Fitech

10:10 AM – 10:25 AM

## Refreshment Break

10:25 AM – 11:25 AM

### LEARNING SESSIONS: SERIES 5

#### Strategic Planning 2.0: What Works and What Doesn't in the Post-Pandemic World

- ▶ Kamal Mustafa, Chairman, Invictus Group

#### Anticipation, Economy, Resilience: Reimagining the Path to Profitable Growth

- ▶ Laurent Birade, Senior Director; Blake Coules, Senior Director; Chris Stanley, Senior Director — Moody's Analytics

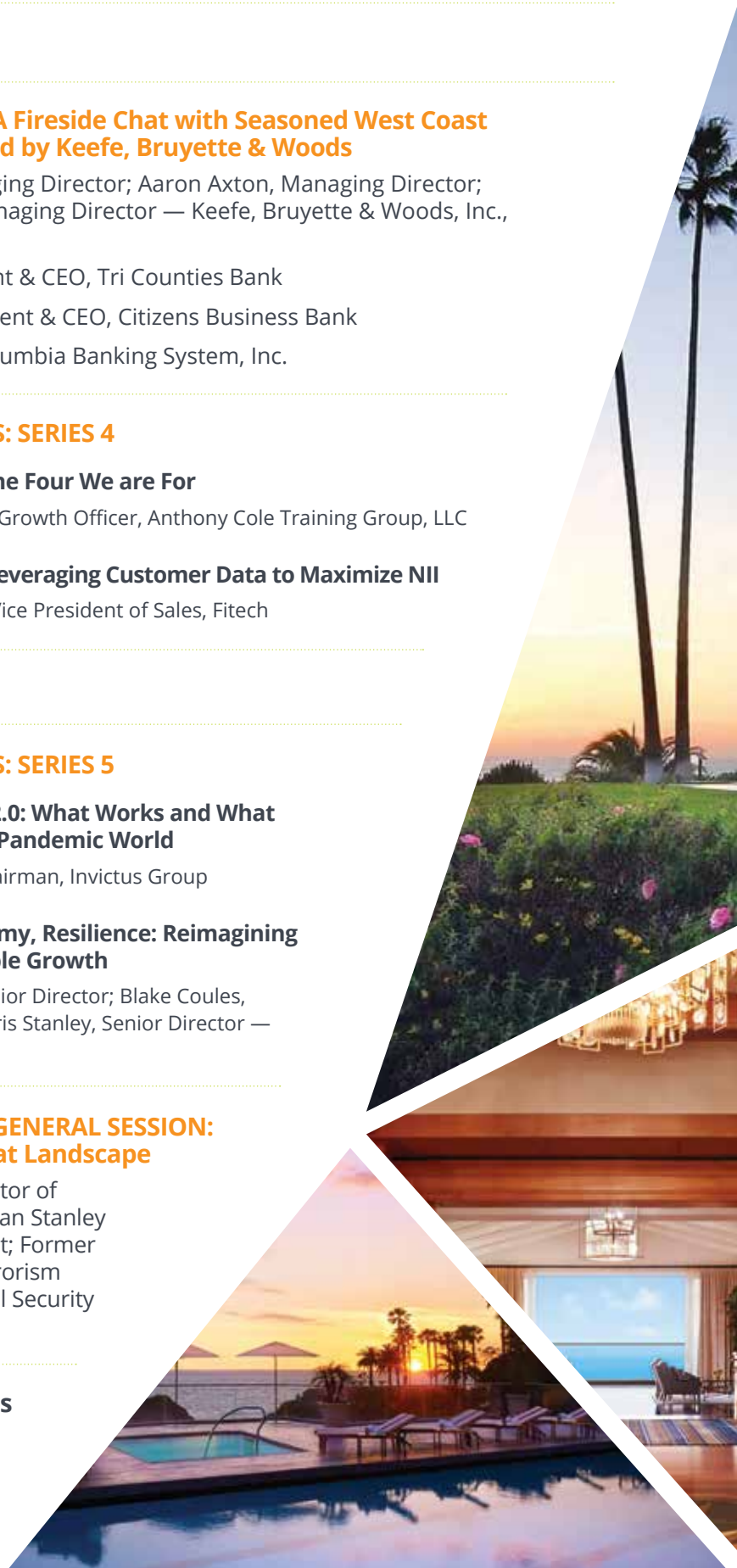
11:35 AM – 12:35 PM

### CLOSING KEYNOTE GENERAL SESSION: The New Cyberthreat Landscape

- ▶ Rachel Wilson, Director of Cybersecurity, Morgan Stanley Wealth Management; Former Head of Counterterrorism Operations, National Security Agency (NSA)

12:35 PM

## Conference Adjourns





# KEYNOTE SPEAKER PROFILES

## Andrew Busch

**Economist; Former CMIO, U.S. Government; Author**

Andrew Busch was the first Chief Market Intelligence Officer (CMIO) for the U.S. government at the Commodity Futures Trading Commission (CFTC). As CMIO, he was charged with improving and enhancing the government's understanding of the markets. Mr. Busch provided briefings to White House, US House and US Senate staffers on a wide range of issues including the economy, stock market direction, interest rates and China's influence on the global commodity markets.

Busch created and directed a new research group, Market Intelligence Branch (MIB), for the agency. As CMIO, his job was to provide objective research on the financial markets to the CFTC, SEC, US Treasury and Federal Reserve. Energy, agriculture, interest rates and technology (Bitcoin, blockchain, AI) were some of the areas of research covered by the team. Each week, he led the agency on a market and economic roundtable discussion with the staffs of the White House, the US Treasury, the SEC, the Federal Reserve Bank of New York and the Federal Reserve Board.

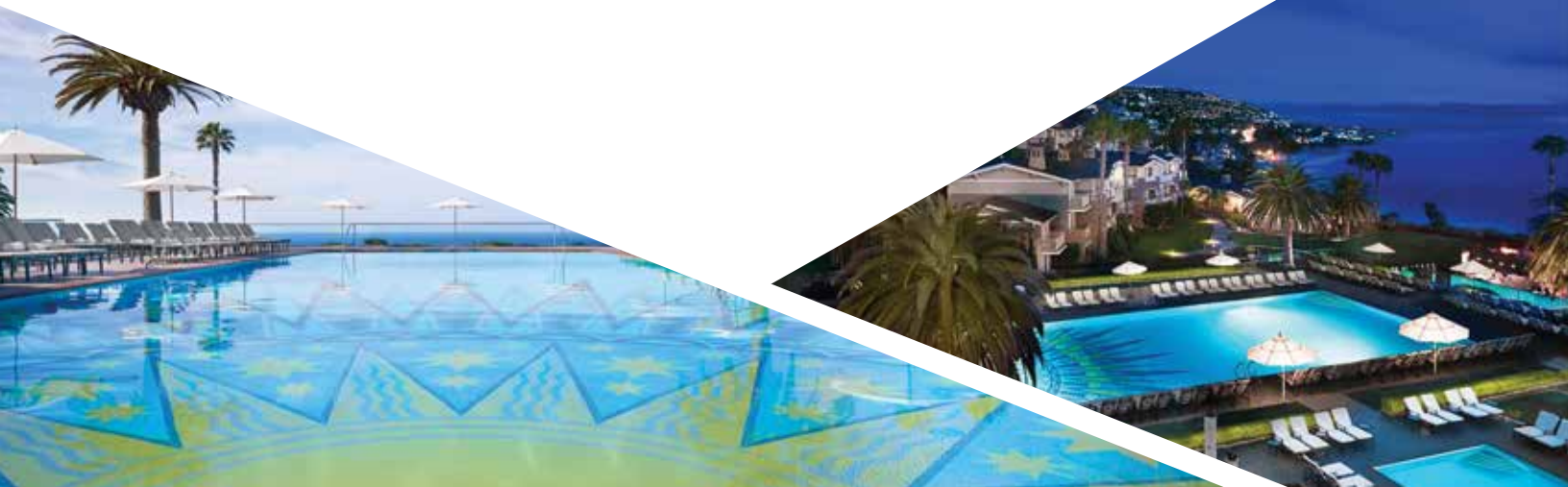


## Rachel Wilson

**Director of Cybersecurity, Morgan Stanley Wealth Management; Former Head of Counterterrorism Operations, National Security Agency (NSA)**

Rachel Wilson spent the first 15 years of her career at the National Security Agency (NSA). Over the course of her NSA career, she held several key senior executive-level leadership positions working to detect and disrupt terrorist and cyber exploitation activity against the US and its allies.

Currently, Rachel Wilson is the first head of cybersecurity for Morgan Stanley Wealth Management, where she is responsible for protecting cybersecurity and ensuring the integrity and confidentiality of firm and client data. Additionally, Rachel advises leadership on cybersecurity issues, including secure code development standards, secure network architecture, vendor relationships, advanced persistent threat (APT) detection and mobile security. She also leads field and client education and communication on cyber risk, threats and mitigations. She and her team drive innovation for new cybersecurity and authentication technology.



## Chris Thornberg, PhD

### Founding Partner, Beacon Economics



Christopher Thornberg founded Beacon Economics LLC in 2006. Under his leadership the firm has become one of the most respected research organizations in California serving public and private sector clients across the United States. In 2015, Dr. Thornberg also became director of the UC Riverside School of Business Center for Economic Forecasting and Development and an Adjunct Professor at the School.

Dr. Thornberg has consulted for private industry, cities, counties, and public agencies in Los Angeles, San Francisco and the Bay Area, San Diego, the Inland Empire, Seattle, Orange County, Sacramento, Nevada, and other geographies across the nation.

Dr. Thornberg is a panel member of the National Association of Business Economists' quarterly "Outlook," and a contributor to monthly economics polls published by the Wall Street Journal and Reuters. He also serves as Chair of the California Chamber of Commerce Economic Advisory Council, is on the Board of Directors of the Los Angeles Area Chamber of Commerce, is an Executive Member of the Central City Association (Los Angeles), and is a member of the California Association for Local Economic Development. Prior to launching Beacon Economics Dr. Thornberg was a senior economist with UCLA's Anderson Forecast.

## Seminar Details

### REGISTRATION

- ▶ Western Bankers Member: **\$995**  
Western Bankers Nonmember: **\$1095**  
Guest: **\$495**
- ▶ The registration fee covers the cost of program sessions, speakers and all meal functions. The spouse fee includes scheduled conference social gatherings and meal functions.
- ▶ Register online at [Westernbankers.com/BPS22](https://www.westernbankers.com/BPS22) or complete the enclosed registration form.
- ▶ Questions? Please contact Gina Titus at [gtitus@westernbankers.com](mailto:gtitus@westernbankers.com).

### CANCELLATIONS/REFUNDS

- ▶ Registration fees less a \$75 processing fee per registrant will be refunded if cancellation is received by Tuesday, December 28, 2021. No refund if cancellations are received after Tuesday, December 28, 2021.

### DIETARY/PHYSICAL NEEDS

- ▶ Any attendee with special dietary or physical needs should indicate so on the registration form.

### LOCATION

- ▶ Montage Laguna Beach  
30801 South Coast Highway  
Laguna Beach, CA 92651  
(949) 715-6000
- ▶ Check-In: 4:00 PM | Check-Out: 12:00 PM
- ▶ To reserve your guest room, contact the resort at (949) 715-6000 and refer to the Western Bankers room block. The WB rate starts at \$449/night, single or double occupancy, plus taxes and fees. Rooms are limited, make your reservations as soon as possible. The room block cut-off is Friday, December 10, 2021. If the room block reaches capacity, the hotel may accept reservations on a space-available basis at the prevailing rates.

### MOBILE APP

- ▶ We will be using the Western Bankers mobile app. Download the app to learn about event sponsors, access the agenda and presentations, engage with attendees, get seminar updates, and more. Simply search "WBA" in either Apple App Store or Google Play Store to download the app today. Once you are registered for the seminar, you'll receive log-in instructions with the access code at a later date.



[Westernbankers.com/bps22](https://westernbankers.com/bps22)