



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

MONDAY, OCTOBER 19-  
TUESDAY, OCTOBER 27, 2020

# AGENDA

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## MONDAY, OCTOBER 19

State Association Host      **Chris D'Elia**, *Vermont Bankers Association*

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### ZOOM PLATFORM

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8:00 am – 8:30 am

#### OPENING SESSION

**Christopher D'Elia**, *Registrar*

Introduction

Philosophy of the School

Plans for the Session

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8:30 am – 9:00 am

#### INTRODUCTION TO BANKING & OTHER ISSUES

**Christopher D'Elia**, *Registrar*

History of Banking and Legislation

Forces Impacting the Industry

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9:00 am – 9:15 am

#### BREAK

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9:15 am – 10:15 am

#### ROLE OF YOUR STATE BANKERS ASSOCIATION

**Christopher D'Elia**, *President, Vermont Bankers Association*

**Kristy Merrill**, *President, New Hampshire Bankers Association*

**Chris Pinkham**, *President, Maine Bankers Association*

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10:15 am – 10:30 am

#### BREAK

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10:30 am – 11:30 am

#### BIRTH ORDER: WHAT'S IT GOT TO DO WITH BUSINESS ANYWAY?

**Jack Agati**, *Encouraging Concepts Associates*

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11:30 am – 4:00 pm

#### BREAK

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4:00 pm – 5:00 pm

#### VIRTUAL RECEPTION WITH ALUMNI

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## TUESDAY, OCTOBER 20

State Association Hostess      **Kristy Merrill**, *New Hampshire Bankers Association*

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### ZOOM PLATFORM

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8:00 am – 9:00 am      **ECONOMIC DEMOGRAPHICS**  
**Brian Gottlob**, *PolEcon Research*

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9:00 am – 9:15 am      **BREAK**

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9:15 am – 9:25 am      **MORNING SHARE – small group breakout**

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9:25 am – 10:25 am      **FRAUD, CYBERCRIME, SECURITY**  
**John H. Rogers**, *CISSP, MonarchISC, LLC*

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10:25 am – 10:40 am      **BREAK**

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10:40 am – 11:55 am      **ERM, CRA & COMPLIANCE**  
**Carol Bailey**, *Internal Auditor*  
*Piscataqua Savings Bank*

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## WEDNESDAY, OCTOBER 21

State Association Host      **Chris Pinkham**, *Maine Bankers Association*

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### ZOOM PLATFORM

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8:00 am – 9:00 am

#### FROM SUPERVISION TO LEADER

**David Ciullo**, *CEO, Career Management Associates*

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9:00 am – 9:10 am

#### BREAK

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9:10 am – 10:10 am

#### FROM SUPERVISION TO LEADER *(continued)*

**David Ciullo**, *CEO, Career Management Associates*

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10:10 am – 10:20 am

#### BREAK

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10:20 am – 11:20 am

#### FROM SUPERVISION TO LEADER *(continued)*

**David Ciullo**, *CEO, Career Management Associates*

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11:20 am – 3:30 pm

#### BREAK

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3:30 pm – 5:00 pm

#### GO GAME VIRTUAL TEAM BUILDING & NETWORKING EVENT

(90 minutes needed)

Be sure to see page for tech requirements to be able to join the game and have a great time!

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**THURSDAY, OCTOBER 22**

State Association Hostess      **Chris D'Elia**, *Vermont Bankers Association*

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## ZOOM PLATFORM

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8:00 am – 9:15 am

### **BANK FINANCIAL STATEMENTS/ROLE OF THE CFO**

**Tom Zuke**, Executive Vice President/ Chief Financial Officer & Treasurer  
Kennebunk Savings Bank

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9:15 am – 9:30 am

### **BREAK**

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9:30 am – 10:00 am

### **ASSET LIABILITY MANAGEMENT**

**Tom Zuke**, Executive Vice President/ Chief Financial Officer & Treasurer  
Kennebunk Savings Bank

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10:00 am – 10:15 am

### **BREAK**

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10:15 am – 11:45 am

### **CEO PANEL DISCUSSION**

**Tony McKim**, President & CEO, First National Bank

**Linda Lorden**, President, Merrimack County Savings Bank

**David Silverman**, President & CEO, Union Bank

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11:45 am – 4:00 pm

### **BREAK**

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4:00 pm – 5:00 pm

### **NETWORKING – INDUSTRY CHALLENGE DISCUSSION**

**COVID-19 – What has your bank been doing to meet the needs of its customers, handle personnel, plan for the future, and other items related to getting through the pandemic.**

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**FRIDAY, OCTOBER 23**

State Association Host **Kristy Merrill**, *New Hampshire Bankers Association*

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## ZOOM PLATFORM

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8:00 am – 9:30 am **FUNDAMENTALS OF LENDING**  
*(Includes Time for Case Study Analysis)*

**TBD**

**TBD**

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9:30 am – 9:45 am **BREAK**

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9:45 am – 9:55 am **MORNING SHARE – small group breakout**

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9:55 am – 10:55 am **THE FUTURE OF FINANCIAL SERVICES**

**Matt Putvinski**, CPA, CISA, CISSP

Wolf & Company, P.C.

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10:55 am – 11:10 am **BREAK**

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11:10 am – 12:10 pm **HUMAN RESOURCE ISSUES IMPACTING MANAGERS**

**Anne Jenness**, Attorney

Gallagher, Callahan & Gartrell, PC

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## MONDAY, OCTOBER 26

State Association Host      **Chris Pinkham**, *Maine Bankers Association*

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### ZOOM PLATFORM

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8:00 am – 9:00 am      **MARKETING FOR THE FUTURE**  
**Linda Varrell**, Broadreach Public Relations

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9:00 am – 9:15 am      **BREAK**

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9:15 am – 10:15 am      **THE ART OF MOTIVATING OURSELVES AND OTHERS**  
**Jack Agati**, Encouraging Concepts Associates

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10:15 am – 10:30 am      **BREAK**

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10:30 am – 12:00 pm      **BUSINESS DEVELOPMENT: ACQUIRING, RETAINING  
AND ATTRACTING CUSTOMERS**  
**Chantal Upton**, Vice President/Sales & Training Manager  
First Seacoast Bank

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12:00 pm – 4:00 pm      **BREAK**

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4:00 pm – 5:00 pm      **NETWORKING – INDUSTRY CHALLENGE  
DISCUSSION**  
TBD

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### TUESDAY, OCTOBER 27

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#### ZOOM PLATFORM

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8:00 am – 9:15 am      **PUBLIC SPEAKING**  
**Cristy Beemer**, *University of New Hampshire*

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9:15 am – 9:130 am      **BREAK**

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9:30 am – 11:00 am      **WRITTEN COMMUNICATION SKILLS**  
**Cristy Beemer**, *University of New Hampshire*

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11:00 am – 11:15 am      **ASSIGNMENTS AND WRAP UP**

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