

September 12-14, 2022 | Wentworth by the Sea, New Castle, NH

# PRELIMINARY AGENDA

## MONDAY, SEPTEMBER 12

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6:30 am - 9:00 am **BREAKFAST**  
On your own for early arrivals

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10:00 am - 5:00 pm **REGISTRATION**  
Atrium/Foyer

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12:00 pm - 1:00 pm **LUNCH BUFFET**  
Wentworth Ballroom

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1:00 pm **FIRST BUSINESS SESSION**  
Grand Ballroom  
  
Welcome & Introductions

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1:15 pm – 2:15 pm **ECONOMIC UPDATE**  
**Jason Hwang, Senior VP, Strategic Planning & Research**  
Federal Home Loan Bank of Boston

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2:15 pm – 3:15 pm **CLOSE ENCOUNTERS OF THE FINTECH KIND**  
**Ray Langen, Regional Director**  
StrategyCorps

Live demonstrations of trending apps like Robinhood, Cash App, SoFi, and Affirm to better understand the new features that are increasing competitive pressures on today's banking products. We'll share ongoing research which explains the trends - including which mobile features matter most to each generation, from zoomers to boomers. We'll also examine how fintech companies like Acorns are leveraging the subscription society (think Amazon Prime, Costco, Netflix, Spotify) and pioneering new recurring revenue-generating models for financial products and services. Here's what you'll learn:

- How leading fintech apps are using data in unique ways to create new categories of banking products
  - How new features from fintech apps are expanding the definition of financial advice
  - How the biggest banks are changing their products to respond to the evolving fintech landscape
  - The newest subscription pricing strategies for financial service products
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3:15 pm – 3:30 pm **BEVERAGE BREAK**  
Atrium/Foyer

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3:30 pm – 4:00 pm **ICBA LEADERSHIP**  
**Lucas White, ICBA Vice Chair**  
Independent Community Bankers of America (ICBA)

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## PRELIMINARY AGENDA

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4:00 pm – 4:30 pm **SBA LEADERSHIP**  
**Mike Vlacich, Regional Administrator**  
**Amy Bassett, NH District Director**  
US Small Business Administration (SBA)

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5:00 pm – 7:00 pm **RECEPTION**  
Foyer & Solarium  
**Sponsored by Independent Community Bankers of America (ICBA)**

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7:00 pm – 9:00 pm **DINNER**  
Wentworth Ballroom

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### TUESDAY, SEPTEMBER 13

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6:30 am - 10:00 am **BREAKFAST**  
Wentworth Ballroom

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8:30 am - 11:00 am **REGISTRATION**  
Atrium/Foyer

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8:30 am **SECOND BUSINESS SESSION**  
Grand Ballroom  
Welcome & Introductions

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8:45 am – 9:45 am **EMPLOYEE MENTAL WELLNESS AND RESILIENCE IS GOOD BUSINESS**  
**Cath Burns, Ph.D.**  
Synchroaic, LLC  
  
The pandemic has highlighted the increasing mental health needs of employees in the workplace. The negative impacts of stress and untreated mental health conditions upon business bottom line has been well documented. Fortunately, there are many things that business leaders can do to support their staff resilience and mental wellness. In this workshop, we will explore the current state of mental health and its impacts upon the workplace, what employees are needing from their employers, and ways to promote mental health, recovery, and mental wellness in their business environment.

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9:45 am – 10:45 am **CORE PROVIDER PANEL DISCUSSION: MANAGE YOUR LOVE/HATE RELATIONSHIP & HOW TO MAKE IT BETTER**  
**Jim Kisch, President & CEO**  
Passumpsic Bank  
**Clay Adams, President & CEO**  
Mascoma Bank  
**Kim Kirk, EVP/COO**  
Queensborough National Bank & Trust Company

## PRELIMINARY AGENDA

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10:45 am - 11:00 am **BEVERAGE BREAK**  
Atrium/Foyer

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11:00 am – 11:45 am **EMERGING ISSUES FACING THE INDUSTRY: IS YOUR BANK PREPARED?**  
This will be a roundtable discussion about upcoming emerging policy issues facing the industry at both the state and federal levels and how banks and the industry can address them. Please be prepared to share and engage in this open forum.

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11:45 am – 12:45 pm **LUNCH (BUFFET)**  
Grand Ballroom

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12:30 pm – 1:45 pm **KEYNOTE SPEAKER**  
**James Olson**

James Olson, the former Chief of Soviet Operations at the CIA, spent his 31-year undercover career at the CIA focused on Russia. He first started tracking Vladimir Putin when Putin was a lieutenant colonel in the KGB in East Germany in the 1980s. Mr. Olson will share with the audience his knowledge of Putin and describe the many assassinations and atrocities for which Putin has been responsible, most recently in Ukraine, but also in Chechnya, Syria, Georgia, and elsewhere. This is the story of a monster, a man with no respect for human life, international law, or national sovereignty. Mr. Olson will draw on his personal operational experiences in Moscow to highlight how Putin and the KGB have operated. He will leave time at the end for questions from the audience.

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2:00 pm – 5:00 pm **CORNHOLE TOURNAMENT**  
*Optional Activity - Pre-registration required*  
**Sponsored by BHG Financial**

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6:00 pm – 7:00 pm **RECEPTION**  
Foyer & Solarium

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7:00 pm - 9:30 pm **ANNUAL BANQUET**  
Wentworth Ballroom  
**Menu Sponsored by Griffin Financial Group**  
**Outstanding Community Service Banker Award**

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### WEDNESDAY, SEPTEMBER 14

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7:30 am - 10:30 am **BREAKFAST**  
Wentworth Ballroom

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11:00 am **CHECK-OUT**

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