



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

MONDAY, OCTOBER 17-  
FRIDAY, OCTOBER 21, 2022

THE VENUE AT PORTWALK PLACE,  
PORTSMOUTH, NH

## AGENDA

---

### MONDAY, OCTOBER 17

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

---

11:45 am – 12:30 pm **BUFFET LUNCHEON**

---

12: 30 pm – 1:00 pm **OPENING SESSION**  
**Christopher D'Elia**, *Registrar*

Introduction

Philosophy of the School

Plans for the Session

---

1: 00 pm – 1:30 pm **INTRODUCTION TO BANKING & OTHER ISSUES**  
**Christopher D'Elia**, *Registrar*

History of Banking and Legislation

Forces Impacting the Industry

---

1: 30 pm – 2:30 pm **ROLE OF YOUR STATE BANKERS ASSOCIATION**  
**Christopher D'Elia**, *President, Vermont Bankers Association*

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

**Jim Roche**, *President, Maine Bankers Association*

---

2: 30 pm – 2:45 pm **REFRESHMENT BREAK**

---

2:45 pm – 5:00 pm **BIRTH ORDER: WHAT'S IT GOT TO DO WITH  
BUSINESS ANYWAY?**

**THE ART OF MOTIVATING OURSELVES AND OTHERS**

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

---

6:00 pm **BEER, WINE & CHEESE RECEPTION**

---

6:30 pm **DINNER**

---



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

MONDAY, OCTOBER 17-  
FRIDAY, OCTOBER 21, 2022

THE VENUE AT PORTWALK PLACE,  
PORTSMOUTH, NH

## AGENDA

---

### TUESDAY, OCTOBER 18

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

---

7:30 am – 8:15 am      **BREAKFAST BUFFET**

---

8:15 am – 9:45 am      **ECONOMIC DEMOGRAPHICS**  
**Brian Gottlob**, *PolEcon Research*

---

9:45 am – 10:00 am      **BREAK**

---

10:00 am – 12:00 pm      **FUNDAMENTALS OF LENDING**  
*(Includes Time for Case Study Analysis)*  
**Charlie Dowd**, *VP Residential Mortgage Sales, Meredith Village Savings*  
**Terrie McQuillen**, *SVP, Sr. Portfolio Manager, Merrimack County Savings Bank*  
**James Gallagher**, *SVP, Sr. Commercial Lending Officer, Merrimack County Savings Bank*

---

12:00 pm – 1:00 pm      **LUNCH**

---

1:00 pm – 2:30 pm      **FRAUD, CYBERCRIME, SECURITY**  
**John H. Rogers**, *CISSP, Monarch Information Security Consultants*

---

2:30 pm – 2:45 pm      **REFRESHMENT BREAK**

---

2:45 pm – 4:15 pm      **MARKETING FOR THE FUTURE**  
**Linda Varrell**, *Broadreach Public Relations*

---

4:15 pm – 4:30 pm      **BREAK**

---

4:30 pm – 5:45 pm      **THE FUTURE OF FINANCIAL SERVICES**  
**Matt Putvinski**, *CPA, CISA, CISSP, Wolf & Company, P.C.*

---

6:30 pm      **DINNER**

---

7:30 pm      **TEAM BUILDING/NETWORKING EXPERIENCE**

---



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

MONDAY, OCTOBER 17-  
FRIDAY, OCTOBER 21, 2022

THE VENUE AT PORTWALK PLACE,  
PORTSMOUTH, NH

## AGENDA

---

WEDNESDAY, OCTOBER 19

State Association Host **Jim Roche**, *Maine Bankers Association*

---

7:30 am – 8:15 am **BREAKFAST BUFFET**

---

8:15 am – 10:15 am **BANK FINANCIAL STATEMENTS/ROLE OF THE CFO**  
**Tom Zuke**, *Executive Vice President/ Chief Financial Officer & Treasurer*  
*Kennebunk Savings Bank*

---

10:15 am – 10:30 am **BREAK**

---

10:30 am – 11:45 am **ASSET LIABILITY MANAGEMENT**  
**Tom Zuke**, *Executive Vice President/ Chief Financial Officer & Treasurer*  
*Kennebunk Savings Bank*

---

11:45 am – 12:30 pm **LUNCH**

---

12:30 pm – 2:00 pm **BUSINESS DEVELOPMENT: ACQUIRING, RETAINING  
AND ATTRACTING CUSTOMERS**  
**Chantal Upton**, *Customer Care Manager, Partners Bank*

---

2:00 pm – 2:15 pm **BREAK**

---

2:15 pm – 3:15 pm **INTRODUCTION TO TRUST SERVICES, WEALTH  
MANAGEMENT AND INSURANCE**  
**Jennifer Cook**, *Senior Vice President, Senior Trust Officer, Norway*  
*Savings Asset Management Group*

---

3:15 pm – 3:30 pm **REFRESHMENT BREAK**

---

3:30 pm – 5:30 pm **CEO PANEL DISCUSSION**  
**Blaine Boudreau**, *President & CEO, Partners Bank*  
**Joan Gile**, *President, Piscataqua Savings Bank*  
**David Silverman**, *President & CEO, Union Bank*

---

**DINNER ON YOUR OWN**

---



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

MONDAY, OCTOBER 17-  
FRIDAY, OCTOBER 21, 2022

THE VENUE AT PORTWALK PLACE,  
PORTSMOUTH, NH

## AGENDA

---

### THURSDAY, OCTOBER 20

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

---

7:30 am – 8:15 am **BREAKFAST BUFFET**

---

8:15 am – 9:45 am **FROM SUPERVISOR TO LEADER**  
**David Ciullo**, *CEO, Career Management Associates*

---

9:45 am – 10:00 am **BREAK**

---

10:00 am – 12:30 pm **FROM SUPERVISOR TO LEADER (continued)**  
**David Ciullo**, *CEO, Career Management Associates*

---

12:30 pm – 1:30 pm **LUNCH**

---

1:30 pm – 3:00 pm **HUMAN RESOURCES ISSUES IMPACTING MANAGERS**  
**Anne Jenness**, *Attorney, Gallaher, Callahan & Gartrell, PC*

---

3:00 pm – 3:15 pm **REFRESHMENT BREAK**

---

3:15 pm – 5:00 pm **ERM, CRA & COMPLIANCE**  
**Ross Bartlett**, *EVP & Chief Commercial Banking Officer, Bank of NH*  
**Natalia Beaulieu**, *VP-Compliance Officer, Bank of NH*

---

6:00 pm **DINNER**

---



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

MONDAY, OCTOBER 17-  
FRIDAY, OCTOBER 21, 2022

THE VENUE AT PORTWALK PLACE,  
PORTSMOUTH, NH

## AGENDA

---

### FRIDAY, OCTOBER 21

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

---

7:30 am – 8:30 am      **BREAKFAST BUFFET**

---

8:30 am – 10:00 am      **PUBLIC SPEAKING**  
**Dr. Cristy Beemer**, *Director of Composition, Professional & Technical Writing Coordinator, Associate Professor, University of New Hampshire*

---

10:00 am – 10:15 am      **BREAK**

---

10:15 am – 12:00 pm      **WRITTEN COMMUNICATION SKILLS**  
**Dr. Cristy Beemer**, *Director of Composition, Professional & Technical Writing Coordinator, Associate Professor, University of New Hampshire*

---

12:00 pm      **ASSIGNMENTS, WRAP UP AND COLLECT EVALUATIONS**

---

12:00 pm      **BOX LUNCHES** (*take it for the road or eat before you leave!*)

---