

Friday, July 11th

9:00 – 9:10 am

Welcome and Introductions

Tanya Duncan, EVP, Revenue and Strategy, Mass Bankers Association

Dave Sidon, Facilitator, the Navis Group Inc.

9:10 – 10:10 am

Building a Derivatives Playbook

Speakers:

Issac Wheeler, Managing Director, Balance Sheet Strategy

Frank Fiorilli, Managing Director of Bank Solutions

10:10 – 10:30 am

Coffee Break

10:30 – 11:45 am

Liquidity Management/The Discount Window

Liquidity stress can manifest quickly, and the discount window is an important tool depository institution can utilize in managing liquidity risk. This session is a unique opportunity to hear directly from the Federal Reserve Bank of Boston regarding various Discount Window borrowing and pledging options and how to position your bank to access these options before a potential borrowing needs. The Discount Window can be a solution for same-day funding needs, and to ensure the efficiency to meet those needs, appropriate preparation steps should be taken in advance. Mr. Barrett will provide a regulator's perspective on liquidity management.

Speakers:

Stephanie Wallace, VP, Supervision, Regulation, & Credit, The Federal Reserve Bank of Boston

Mark Brassard, AVP, Supervision, Regulation, & Credit, The Federal Reserve Bank of Boston

Patricia Valley, AVP, Supervision, Regulation, & Credit, The Federal Reserve Bank of Boston

James Barrett, Deputy Commissioner, Massachusetts Division of Banks

11:45 – 12:15 pm

Networking Luncheon

12:15 – 1:00 pm

Changing landscape of Insurance

Speaker **Theresa Reardon**, Esquire, Director of Commercial Lines & Financial Services,
Dwight Rudd Insurance

With the rise of AI and insurance claims, insurance carriers are reviewing their policies and making changes. We will discuss some of those changes and why they are being made.

- 1. Biometric data and why insurance companies are worried about it.**
- 2. Impact of AI on your insurance policies.**
- 3. Important changes to, and components of the cyber policy.**
- 4. Building values and rates for property and casualty on the rise and what you can do about it.**
- 5. How much insurance do you really need? What is the standard for your size institution?**

1-2 PM Roundtable Discussion

2 PM Adjourn