



3rd Massachusetts Banking Innovation Summit June 6-7, 2024 | Encore Boston Harbor

Agenda

Thursday, June 6, 2024

5:30 PM **Mass Banker's Welcome Reception - Degas Room**

The Welcome Reception is back! Please join us on Thursday, June 6th at 5:30 PM in the Degas Room to kickstart the Innovation Summit and your networking experience. Mass Bankers is grateful to **Diebold Nixdorf** and **Ncontracts** for sponsoring the Welcome Reception, which will include all manner of banking talent, including emerging leaders in technology and c-suite executives within our membership. The reception is open to all participants in Friday's Summit, including bankers, exhibitors, and speakers.

Friday, June 7, 2024

7:45 AM **Networking and All American Breakfast in the Picasso Ballroom 7 & 8**

9:00 AM **"Banking on Innovation: Mastering Connected TV to Outsmart Regional and National Competitors", TriAD CTV, Alex Smith, Chief Strategy Officer, Picasso Ballroom 5 & 6**

The opening general session of the Innovation Summit will explore the dynamic realm of Connected TV as TriAD CTV unveils strategies for banking marketers to seamlessly access CTV inventory, precisely target pre-qualified and "in-market" audiences and gain a competitive advantage against regional and national rivals. This keynote presentation will provide exceptional insights and tactics essential to navigate the evolving landscape of banking innovation.

10:00 AM **Networking with Exhibitors in the Picasso Ballroom 7 & 8**

Please join us at 10:00 AM in the Picasso Ballroom to network with our event exhibitors and sponsors. The showcase will feature our premiere exhibit partners in a comfortable floor plan for conversation and mingling.

Additionally, make sure to check out the Fintech Startup Market! The Market will have a co-branded Mass Bankers and Mass Fintech Hub (MFTH) booth surrounded by startup technology companies within the MFTH membership cohort.

11:00 AM **Concurrent Breakout Sessions in Monet and Cezanne 1 & 2 Meeting Rooms**

"Bridging Worlds – Navigating the New Digital Ecosystem", a Banking Panel, moderated by Lynne Marlor, Blockchain Subject Matter Expert (SME) and Co-Founder Women in Digital Assets

Participants:

- **Reba Beeson, General Counsel, AlphaPoint**
- **Krista Lynch, Vice President, Grayscale Investments**
- **Sandra Mostacci, Head of Delivery, Lab49**

In today's rapidly evolving financial landscape, the convergence of blockchain technology and traditional banking systems is reshaping the industry's future. You may be thinking, "What are my bank's options in this space?" Our banking panel will dive right into crucial topics like blockchain interoperability and functionality while evaluating a community bank's options for offering innovative deposit or investment services for clients. The future of financial services prioritizes digital strategies and execution along with an enhanced customer experience. Our panelists will explore these topics and other questions while outlining specific scenarios for creating a community-based digital strategy.

“Cybersecurity 2.0 – Helping Your Bank Step into NIST 2.0, MDR 2.0, and IAM 2.0”, Jeff Miller, Channel Manager at Adlumin

Jeff Miller, Channel Manager at Adlumin, will take you on a journey from the cybersecurity of last decade (think “1.0”) to the more modern “2.0” cyber frameworks and toolsets. Mr. Miller will discuss how new developments in automation, artificial intelligence, and data access have enhanced private business’s ability to prevent, detect, and respond to cybersecurity threats.

Jeff’s presentation will start with the updated NIST cyber framework, Version 2.0 and highlight why this longstanding governance framework was finally amended after 6 years. We will then work through the evolution of Managed Detection and Response (MDR) platforms and toolsets that are prevalent in financial services, while discussing how AI and process automation have changed the game in advanced threat detection.

“Fintech Meet & Greet with the Mass Fintech Hub”, a Power Breakout session moderated by Julie Thurlow, President & CEO, Reading Cooperative Bank and Chair, ABA

Members of the Mass Fintech Hub’s (MFTH) cohort will be present to discuss their startups, how they are aligned with community and regional bank product and service needs, and the vital ecosystem that is thriving within the MFTH itself.

The Fintech Meet & Greet will introduce bankers to new business opportunities and potential collaborator organizations that are ready to solve customer needs and development challenges inherent to financial services – from the most local concerns to regional and national strategic priorities.

**12:00 PM Lunch with Exhibitors and Sponsors in the Picasso Ballroom 7 & 8
Sponsored by Convergent Technologies**

1:15 PM Concurrent Breakout Sessions in Degas and Cezanne 1 & 2 Meeting Rooms

“Powering Potential through Community Bank Innovation”, Wayne Miller, Senior Vice President, ICBA Ventures

Community bankers are operating in a fast-paced world with a myriad number of solutions to address strategic concerns like growth and customer engagement. There is ample opportunity in the financial landscape. Technology is an obvious key driver that assists financial institutions in becoming more efficient, profitable, and competitive.

Please join this session with Wayne Miller, SVP at ICBA Ventures, to hear more about how the community bank differentiators leverage strategic thinking and problem-solving through the ICBA’s ThinkTECH Accelerator and how initiatives like accelerator programs help solve top-of-mind banking challenges for customers all around the country.

Ensuring that your bank places a serious emphasis on exactly what problems it wants to solve will give technology leadership the best chance at providing a maximum benefit to all your strategic goals – increased stability, improved customer experience, and more.

“Capturing the Market’s Attention: Unveiling the Evolution of Predictive Analytics”, Pat Lapomarda, Managing Director, Arkatechture

Arkatechture is a premiere data engineering and technology company dedicated to empowering organizations with a better understanding of their business through data. Arkatechture and Mass Bankers recently collaborated on a member survey of technology priorities and strategic focuses in the current and prospective economic environment.

Feeling overwhelmed by terms like predictive analytics, machine learning and artificial intelligence? Worried your organization is lagging in these critical areas? Join us for a practical session that demystifies these concepts, focusing on the role of GPT in ChatGPT.

Discover the current landscape and pinpoint where your attention should be directed. Gain insights on navigating regulatory challenges and hear entertaining cautionary tales that shed light on the importance of these innovations.

“Unlock Deposit Growth: A Branch Modernization Playbook”, Jeffrey Calnen, Senior Enterprise Account Executive, MANTL

Looking to optimize commercial and retail deposit growth and improve operational efficiency across all banking channels in the coming year?

Join MANTL to discuss its playbooks for omnichannel deposit transformation. Learn how to digitize and sync your deposit origination experience across branches, online, and call centers to drive better business outcomes, including supercharged commercial and retail growth, better operational efficiency, and improved customer experiences