



Bank Security Officers Certificate Summit

December 18, 2025 | Courtyard Marriott, 75 Felton Street, Marlborough, MA

Agenda

- 8:30 AM** **Registration and Light Breakfast**
- 9:00 AM** **Welcome and Introductions**
Ben Craigie, SVP Professional Development Group, Mass Bankers Association
- 9:05 AM** **“Bank Security 2.0, Session I”**
Terry Choate, Founder, Blue-U Defense
Blue-U Defense has partnered with several banking associations across the country to provide innovative training and thought-provoking solutions to complex issues in the workplace affecting the physical security and safety of you and your colleagues. Security 2.0 will highlight customer service security concepts, how to efficiently and persistently monitor safety threats in today’s economic and political climate, and staple tactics for de-escalation in high-stress scenarios.
- 10:15 AM** **“Technology and Innovation Trends in Physical Security – A Panel Discussion”**
Anthony Fama, Integrated Security Consultant, American Alarm
Marty Patnaude Riley CPP, CPTED2, OSHA 10, Integrated Systems Consultant, American Alarm
Juli Sampson CPTED, Integrated Security Consultant, American Alarm
- 11:10 AM** **“Violent Crimes, Bank Robberies and Trends in Law Enforcement”**
Delegation from the FBI Boston Field Office
- 11:45 AM** **Lunch & Remarks by Bill O’Keefe**
- 1:15 PM** **“Bank Security 2.0, Session II”**
Terry Choate, Founder, Blue-U Defense
- 1:55 PM** **“Bank Security 2.0, Session III”**
Terry Choate, *Founder, Blue-U Defense*
- 3:00 PM** **Adjourn**