

Mass Bankers Connect Conference Agenda

Accounting/Finance Track

- 8:30 AM** **Welcome & Opening Remarks**
- 8:35 AM** **General Session – The AI-Driven Bank: Strategic Relevance in a Time of Rapid Change**
Eric Cook, CEO, WSI
- 9:35 AM** **Coffee Break | Networking with Exhibitors**
- 10:15 AM** **Modern Treasury Management: Insights from CFGI & Empyrean**
Sean Carraher, Head of Treasury, Cambridge Savings Bank, PJ Cole, Managing Director, Empyrean Solutions and Lauren Intinarelli, Managing Director, CFGI
- 11:15 AM** **What's Next in Accounting and Tax: Updates from the FASB and Capitol Hill**
Jim McGough and Kelley Chartier, Wolf & Company, P.C.
- 12:15 PM** **Lunch | Networking with Exhibitors**
- 1:15 PM** **General Session – “AI in Action: Navigating Risk, Compliance, and Innovation in Community Banking”**
Alec Crawford, Founder and CEO, AI Risk Inc.
- 2:30 PM** **From Close to Forecast: AI's Role in Modernizing Bank Accounting Functions**
Tom Alexander and Jay Spencer, Partners at Cross Country Financial
- 3:30 PM** **Closing Comments & Raffle**



Mass Bankers Connect Conference Agenda

Compliance & Risk Management Track

- 8:30 AM** **Welcome & Opening Remarks**
- 8:35 AM** **General Session – The AI-Driven Bank: Strategic Relevance in a Time of Rapid Change**
Eric Cook, CEO, WSI
- 9:35 AM** **Coffee Break | Networking with Exhibitors**
- 10:15 AM** **Reg. Change at Ground Level: What Bank Compliance Officers Need to Know Now**
Dan Hartman, Of Counsel, Nutter, McLennan & Fish, and Rob Tammero, Partner, K&L Gates with Panel Moderator Ben Craigie, SVP, Mass Bankers Association
- 11:15 AM** **The Compliance Officer's Role in Cyber Resilience**
Jeff Miller, Channel Account Manager, N-able
- 12:15 PM** **Lunch | Networking with Exhibitors**
- 1:15 PM** **General Session – AI in Action: Navigating Risk, Compliance, and Innovation in Community Banking**
Alec Crawford, Founder and CEO, AI Risk Inc.
- 2:30 PM** **Risk Management Perspectives on Concentration and Credit Risk in a Shifting Economy**
Steve Carpinella, President and CEO, Cobblestone
- 3:30 PM** **Closing Comments & Raffle**



Mass Bankers Connect Conference Agenda

Human Resources Track

- 8:30 AM** **Welcome & Opening Remarks**
- 8:35 AM** **General Session – The AI-Driven Bank: Strategic Relevance in a Time of Rapid Change**
Eric Cook, CEO, WSI
- 9:35 AM** **Coffee Break | Networking with Exhibitors**
- 10:15 AM** **Lessons from Oversights of Compensation Arrangements**
Tom Hutton & Brendan Saxon, Luse Gorman
- 11:15 AM** **Leading Through Change**
Steve Hopkins, Director, Wipfli
- 12:15 PM** **Lunch | Networking with Exhibitors**
- 1:15 PM** **General Session – AI in Action: Navigating Risk, Compliance, and Innovation in Community Banking**
Alec Crawford, Founder and CEO, AI Risk Inc.
- 2:30 PM** **Future Ready**
Cheryl Haynes, Founder and Principal Consultant, AchieveMentor LLC
- 3:30 PM** **Closing Comments & Raffle**



Mass Bankers Connect Conference Agenda

Information Technology Track

- 8:30 AM** **Welcome & Opening Remarks**
- 8:35 AM** **General Session – The AI-Driven Bank: Strategic Relevance in a Time of Rapid Change**
Eric Cook, CEO, WSI
- 9:35 AM** **Coffee Break | Networking with Exhibitors**
- 10:15 AM** **AI in Banking IT: Transforming Infrastructure, Operations, and Security**
Patrick Avery, Practice Lead - GRC & Audit , Brian Brunelle, Director of Risk Management & Audit, and Mike Kannan, Director of IT Assurance and Security Research, GraVoc
- 11:15 AM** **Integrating & Leveraging with Fintech Firms to Broaden Customer Relationships**
Steve Dow, Co-Founder & CEO, Monit, and Meghan Sutherland, CEO, FiVerity with Panel Moderator, Steve Dorval, Sr. Innovation Advisor, Mass Bankers Association
- 12:15 PM** **Lunch | Networking with Exhibitors**
- 1:15 PM** **General Session – AI in Action: Navigating Risk, Compliance, and Innovation in Community Banking**
Alec Crawford, Founder and CEO, AI Risk Inc.
- 2:30 PM** **TBD**
- 3:30 PM** **Closing Comments & Raffle**



Mass Bankers Connect Conference Agenda

Marketing Track

- 8:30 AM** **Welcome & Opening Remarks**
- 8:35 AM** **General Session – The AI-Driven Bank: Strategic Relevance in a Time of Rapid Change**
Eric Cook, CEO, WSI
- 9:35 AM** **Coffee Break | Networking with Exhibitors**
- 10:15 AM** **Adapting with Confidence: Marketing Strategies for Times of Transition**
Amber Farley, Partner & EVP of Brand Development, FMS
- 11:15 AM** **Marketing the Marketing: How to Get Noticed, Heard, and Taken Seriously**
Eric Cook, CEO, WSI
- 12:15 PM** **Lunch | Networking with Exhibitors**
- 1:15 PM** **General Session – AI in Action: Navigating Risk, Compliance, and Innovation in Community Banking**
Alec Crawford, Founder and CEO, AI Risk Inc.
- 2:30 PM** **From Insights to Action: A Peer Exchange on Change and Innovation**
Networking Session, led by Shelley Regin, Chief Marketing & Community Relations Officer, Country Bank and joined by other Marketing Experts from across the state
- 3:30 PM** **Closing Comments & Raffle**



Mass Bankers Connect Conference Agenda

Retail Banking Track

- 8:30 AM** **Welcome & Opening Remarks**
- 8:35 AM** **General Session – The AI-Driven Bank: Strategic Relevance in a Time of Rapid Change**
Eric Cook, CEO, WSI
- 9:35 AM** **Coffee Break | Networking with Exhibitors**
- 10:15 AM** **Intelligent Routing via Payment Hubs: Revolutionizing Payment Processing**
Sean Carter, President & CEO, NEACH
- 11:15 AM** **Driving Deposit Growth: Strategies to Acquire, Engage, and Retain**
Charles Baker, Director of Client Service, CSI
- 12:15 PM** **Lunch | Networking with Exhibitors**
- 1:15 PM** **General Session – AI in Action: Navigating Risk, Compliance, and Innovation in Community Banking**
Alec Crawford, Founder and CEO, AI Risk Inc.
- 2:30 PM** **Topic TBD**
Wendy Erhart & Sharon Cook, Vericast
- 3:30 PM** **Closing Comments & Raffle**

