



# Women in Banking Change • Grow • Lead

May 24, 2018

Sheraton Framingham Hotel & Conference Center  
1657 Worcester Road, Framingham, MA



## FEATURED SPEAKERS:



### ***Rebeca Romero Rainey***

**President & CEO-Elect, Independent Community Bankers of America, Washington D.C.**

Rebeca Romero Rainey is president and CEO-elect of the Independent Community Bankers of America. She is one of the nation's foremost advocates of the community banking industry, with a focus on regulatory reform for our country's nearly 5,700 community banks. She has met with President Obama and President Trump to discuss issues that are top of mind for community banks.

A third-generation community banker and the former Chairman and CEO of Centinel Bank of Taos. Romero Rainey has also served on several boards and in an advisory capacity for federal banking agencies. She has been featured on major television networks and has testified before Congress.



### ***Mary Beth Sullivan***

**Managing Partner, Capital Performance Group, LLC**

Mary Beth is a founding partner of Capital Performance Group LLC, a management consulting firm that provides advice, research, analysis, and project management services to the financial services industry. She has 25 years of experience in financial services, both as a practitioner and an advisor to senior managers and directors.

Mary Beth is a frequent speaker on topics such as strategy, competition, and best practices in U.S. financial services companies.



### ***KEYNOTE SPEAKER: Linda Verba, Retired***

**Former Head of Service Strategy, TD Bank — *American Banker Lifetime Achievement Award Recipient***

Linda Verba is the former head of Service Strategy at TD Bank, where for 19 years she oversaw the company's East Coast expansion and its distinctive, service-oriented culture. She oversaw the launch of the TD Legendary Experience Index, which uses survey data to measure the likelihood of customers to increase their business with the company.

She received a lifetime achievement award from the *American Banker* Most Powerful Women in Banking and Finance program. She retired from TD Bank in 2017.

# 6th Annual Women in Banking Conference

Thursday, May 24, 2018

Sheraton Framingham Hotel and Conference Center

## AGENDA

- 8:30 a.m.      **Registration and Continental Breakfast**
- 9:00 a.m.      **Welcome and Introduction of the Women in Banking (WIB) Advisory Group**  
*Tanya M. Duncan, Senior Vice President, Corporate Policy, Massachusetts Bankers Association, Boston*
- 9:10 a.m.      **Opening Speaker: "Leadership and Advocacy"**  
*Rebeca Romero Rainey, President & CEO, Independent Community Bankers of America, Washington D.C.*
- 10:00 a.m.      **Networking Break and Table Exchange**
- 10:20 a.m.      **Leadership Panel**  
**The panelists will discuss developing and mentoring employees, attracting and retaining employees, improving the customer experience and engaging in the community, and diversity and inclusion.**  
**Moderator:**    *Tanya Duncan*  
**Panel:**            *Paula M. Cotter, Senior Vice President, Operations, East Boston Savings Bank, Peabody, MA*  
                          *Tami M. Gunsch, Executive Vice President, Retail Banking, Berkshire Bank, Pittsfield, MA*  
                          *Laura Newstead, Senior Vice President, Chief Human Resources Officer, Cape Cod Five Cents Savings Bank, Orleans, MA*  
                          *Tye Graham, Senior Vice President, Director, HR Business Partnerships, Talent Acquisition, Diversity and Inclusion, Eastern Bank*
- 11:20 a.m.      **Table Discussion on Leadership Panel Topics**
- 11:45 a.m.      **Helping Women Out of Poverty**  
*Ana Zepeda, Senior Associate of Institutional Advancement, EMPATH Economic Mobility Pathways, Boston*
- Noon             **Networking Lunch**
- 1:00 p.m.      **KEYNOTE ADDRESS: How You Can Lead From Any Chair and Thoughts on Service Leadership**  
*Linda Verba, Retired, Former Head of Service Strategy, TD Bank — American Banker Lifetime Achievement Award Recipient*
- 1:50 p.m.      **Break**
- 2:05 p.m.      **Strategies Required to Succeed in a Rapidly Changing Industry**  
*Mary Beth Sullivan, Managing Partner, Capital Performance Group, LLC*
- 3:00 p.m.      **Closing Remarks, Evaluations and Adjourn**





## 2018 Women in Banking Advisory Group Members

Nicole Almeida, First Vice President, and Marketing Director, BayCoast Bank, Swansea, MA

Paula M. Cotter, Senior Vice President, Operations, East Boston Savings Bank, Peabody, MA

Jane F. Cullen, AAP, Vice President Business Services Manager, Webster Five, Worcester, MA

Terri Fox, Senior Vice President, Retail Administration, Monson Savings Bank, Monson, MA

Tami M. Gunsch, Executive Vice President, Retail Banking, Berkshire Bank, Pittsfield, MA

Laura Newstead, Senior Vice President, Chief Human Resources Officer, Cape Cod Five Cents Savings Bank, Orleans, MA

Gilda M. Nogueira, President & CEO, East Cambridge Savings Bank

Elizabeth Osborne, Senior Vice President, Chief Information Officer, Belmont Savings, Belmont, MA

Michele L. Roberts, Executive Vice President, Community Relations Officer, Bristol County Savings Bank, Taunton, MA

Shanika M. Rogowski, Senior Vice President/ Chief Revenue Officer/CRA Officer, Mansfield Co-Operative Bank, Mansfield, MA

Marianne Smith, Senior Vice President, Treasurer, Cape Ann Savings Bank, Gloucester, MA

### Attire

Business attire is recommended for the conference. Be advised, meeting room temperatures and personal comfort zones vary widely. It is recommended that you bring a sweater or jacket to the sessions.

### Hotel Information + Accommodations

The Sheraton Framingham Hotel & Conference Center, 1657 Worcester Road, Framingham, MA 0170 is the host hotel for the conference. A room block has been reserved for May 23, and is available until May 3, 2018.

The room rate will be \$129/per room, per day, plus state & local tax of 11.7 % for single or double occupancy. Hotel accommodations can be secured by calling 1-800-325-3535 and identifying yourself as a part of the **Mass Bankers Women in Banking Conference**, **or you can register by clicking on this link:** <https://www.starwoodmeeting.com/Book/WomenInBanking2018>

Breakfast is available for \$16/pp. Rooms will be available at 4:00 p.m. the day of check-in. Check out time is 11:00 a.m. **Hotel Cancellation** - Cancellations must be made 48 hours before the date of arrival or one night's room rate will be charged to the individual. All unreserved rooms in the block will be released for sale to the public on May 4, 2018.





This year the Women in Banking Conference and the MBA are proud to partner with ***Economic Mobility Pathways*** (EMPath). EMPath is one of the largest providers of homeless family shelters in Massachusetts. In addition to providing a safe place to stay, EMPath also delivers life-changing coaching and goal setting to participants, helping them to get jobs, attain higher education, and manage their finances at rates that far exceed their peers.

EMPath has written a new map for service providers, to help them to serve their participants better, and shares its model with over 75 organizations across the country (and increasingly, around the world!). EMPath serves more than 1,000 persons in Boston every year and touched the lives of over 55,000 low-income individuals last year through organizations using their model.

Staff from EMPath will be on-site during the conference to talk about their work. Please consider a tax-deductible donation.

Visit EMPath at:  
[www.empathways.org](http://www.empathways.org).



# Women in Banking

May 24, 2018 ♦ Registration 8:30 a.m. Program 9 a.m. Concludes 3 p.m.

Sheraton Framingham Hotel & Conference Center ♦ 1657 Worcester Road, Framingham, Massachusetts 01701

**Please print or type:**

Institution \_\_\_\_\_

Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_ FAX \_\_\_\_\_

**Please register the following persons:**

Name	Nickname for Badge	Title	Email
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Registration per person

Member: \$ 250 per person Amount Enclosed \$ \_\_\_\_\_

10 or more participants: \$ 200 per person Amount Enclosed \$ \_\_\_\_\_

Non-member: \$ 500 per person Amount Enclosed \$ \_\_\_\_\_

**Registration Fees include meals, receptions, refreshment breaks, and conference materials.**

**Please Note: This year there will be open seating to maximize networking opportunities.**

### Three ways to register:

**Online:** [www.massbankers.org](http://www.massbankers.org)

**Fax:** Credit card payments to our secure fax line 617-249-0441.

**PCI Compliance mandates that the form must be faxed, do not email.**

**Mail:** Please return this form with payment to:

Massachusetts Bankers Association-WIB18  
One Washington Mall, 8th Floor, Boston, MA 02108-2603

### Credit Card Information:

MasterCard  Visa  American Express  Discover

For information about sponsoring this event, please contact Tanya Duncan  
[tduncan@massbankers.org](mailto:tduncan@massbankers.org)  
TEL 617-502-3801

Card Number \_\_\_\_\_ Amount \_\_\_\_\_

Expiration Date \_\_\_\_\_ Signature \_\_\_\_\_

**Cancellation and refund policy:** We provide full refunds for cancellations received at the MBA office by May 18, 2018. After that date, we retain a \$75 fee per canceled registration. Persons canceling after May 18 will not receive a refund. However, substitutions are permitted. Registrants are responsible for canceling their hotel reservations.

**Registration Deadline: EARLY RESERVATIONS ARE ENCOURAGED.** To assist us in planning, registrations should be sent as soon as possible but no later than **May 17, 2018**. Please direct inquiries or cancellation information to Pat Tabolsky, [ptabolsky@massbankers.org](mailto:ptabolsky@massbankers.org).

**Disabilities or Dietary Restrictions:** If you have any dietary restrictions or disabilities and need assistance, please indicate on the registration form.

**For faster registration,** register on-line at [www.massbankers.org](http://www.massbankers.org). Payment by check must be received by the Association, on or before the seminar date, either by mail or hand-carried to the seminar.

# SPONSORSHIP OPPORTUNITIES

We invite our **member banks as well as associate members** to sponsor our Women in Banking Conference. All sponsors will receive:

- Logo recognition on the conference program
- Signage at the event
- Gold Sponsors receive recognition from the podium
- Complimentary registrations according to the sponsor level

<b>Gold sponsor</b>	<b>\$2,500 includes five complimentary registrations, company logo on program materials, social media posts, shared signage at the event, and recognition from the podium during the program.</b>
<b>Silver Sponsor</b>	<b>\$1,500 includes two complimentary registrations, company logo on program materials, social media posts, and shared signage at the event.</b>
<b>Bronze Sponsor</b>	<b>\$500 includes company logo on program materials, social media posts, and shared signage at the event.</b>

Sponsorships received before May 15<sup>th</sup> will be included in the material disseminated at the Conference.

If you are interested in sponsorship, please indicate the level below and submit a high resolution copy of your company logo to [lglancy@massbankers.org](mailto:lglancy@massbankers.org). Sponsorship payment may be remitted using a credit card or you may request an invoice. For questions, contact Tanya Duncan at 617-502-3801 or [tduncan@massbankers.org](mailto:tduncan@massbankers.org)

Institution \_\_\_\_\_

Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

Telephone \_\_\_\_\_

Fax \_\_\_\_\_

Sponsorship Level \_\_\_\_\_

**Name of individuals attending with complimentary registration:**

1. \_\_\_\_\_ 3. \_\_\_\_\_

2. \_\_\_\_\_ 4. \_\_\_\_\_

5. \_\_\_\_\_

For **Credit Card** payments, please fax to our secure fax line: (617) 249-0441. **PCI Compliance mandates that payments made by credit card must be faxed, do not email.**

MasterCard       Visa       American Express       Discover

Card Number \_\_\_\_\_ Amount \_\_\_\_\_

Expiration Date \_\_\_\_\_ Signature \_\_\_\_\_

**Mail this form with a check to:** Massachusetts Bankers Association  
One Washington Mall, 8th Floor, Boston, MA 02108-2603