

MID-ATLANTIC CEO FORUM

AN EVENT FOR BANK CEOs AND SENIOR LEADERSHIP

NOVEMBER 7-9, 2021

RENAISSANCE BALTIMORE HARBORPLACE HOTEL

Brought to you by: Pennsylvania, Virginia, Delaware, West Virginia, and Maryland Bankers Associations



VIRGINIA BANKERS
ASSOCIATION



WV Bankers
Advocacy Education Leadership



2021 MID-ATLANTIC CEO FORUM AGENDA

SUNDAY, NOVEMBER 7, 2021

5:30 - 6:30 p.m. **Welcome Reception**

**Dinner is on your own. Enjoy the evening!*

MONDAY, NOVEMBER 8, 2021

9:00 a.m. **Registration**

9:30 - 9:35 a.m. **Welcome & Announcements**

9:35 - 10:30 a.m. **Economic Update**
Kartik Athreya, Federal Reserve Bank of Richmond

10:30 - 11:30 a.m. **The Future of Branching Strategy**
Jim Caliendo, PWCampbell

When it comes to reimagining retail branch networks and optimizing main office space, how do financial leaders know what's new – and what's next? They look to Jim Caliendo, a recognized professional in the design-build and financial services industries. Serving as President & CEO of PWCampbell for 22 years, Jim oversees the day-to-day operations of PWCampbell and its four subsidiary companies and acts as the company's visionary leader taking the company into new markets and expanding its service offering. Throughout his career, Jim has influenced over one million square feet of retail space within the financial industry and developed main office space to maximize efficiencies for hundreds of financial institutions. Backed by two decades as a bank executive for a \$1.8 billion savings association, Jim has a knack for blending the two industries to get to the heart of a concept and then explains it simply and concisely. A born storyteller, Jim's vast knowledge of the design-build industry combined with his humor, engaging manner, and meaningful advice, make him an ideal choice for leading educational sessions and facilitating board and management retreats. Audiences leave Jim's presentations with proven, real-world ideas they can immediately implement to successfully transform and expand their retail branch networks, maximize efficiencies and branch profitability, and ensure efficiency of operational space.

Session sponsored by PWCampbell

10:30 - 11:40 a.m. **Networking Break**

11:40 a.m. - 12:40 p.m. **Data Transformation Strategies**
Kim Snyder, KlariVis & Steven Poynot, Howard Bank

This session will discuss the big data challenges present in financial institutions of all sizes and discover strategies to mitigate the challenges, thereby leveraging the power of data to drive financial value. The introduction will focus on several big data challenges financial institutions are facing today and the impact these challenges have on meeting financial objectives:

- The sheer volume of data institutions receive and extracting the value it holds in order to provide a customer-centric experience.
- The roadblocks disparate and antiquated systems create to impede accessing high-value data for strategic decision-making.

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- The overall lack of enterprise knowledge accessible to leaders as a result of not having a holistic view of their organization.
- The cultural paradigm financial institutions confront when facing a data transformation
- The lack of human and financial resources due to competing priorities.

Next, Steve will discuss how Howard Bank approached its own data transformation, lessons learned, and value gained across the organization. He will touch on the cultural challenges, correlation with the bank's overarching strategic plan, and how to measure success, including the importance of developing and evaluating goals, objectives, and evaluation of supporting systems. Steve will also discuss the importance of finding the right vendor partnerships that can offer the expertise and support needed for a successful transformation, and Howard Bank's decision-making process around build versus buy.

Session Takeaways:

- How and why to establish a data-centric culture
- The importance of creating a data governance strategy and the correlation with the Bank's Strategic Plan
- The value of data as an enterprise-wide asset
- Significance of unifying disparate systems to gain a holistic view of your bank and customer
- Reasons to partner with vendors who understand challenges specific to financial institutions and acquire tools that will allow for enterprise reporting and support the Bank's strategic objectives.

Session sponsored by KlariVis

12:40 - 1:40 p.m. Lunch

1:40 - 2:40 p.m. Banking in the 21st Century – Financial Institutions and Fintech: Current Trends, Opportunities and Real World Case Studies

Glen Trudel, Scott Coleman, Ballard Spahr, LLP; Guest Speaker (TBD)

In this session, we will take an in-depth look at several of the banking and financial services industry's current intersections with fintech entities, highlighting the most impactful issues. Our team of lawyers will discuss trends, opportunities, and other areas of which financial institutions seeking to partner with fintech companies need to be aware, including risk, transactional, and regulatory concerns. Our Ballard Team will explore Fintech players as both partners and competitors to banks. And with the help of a guest industry speaker, we will explore real world case studies geared for banking CEO's and key executives.

Session sponsored by Ballard Spahr, LLP

2:40 - 2:55 p.m. Networking Break

2:55 - 4:30 p.m. Banker Panel and Roundtable

6:00 p.m. Reception

7:00 p.m. Dinner

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TUESDAY, NOVEMBER 9, 2021

7:30 - 8:30 a.m. Continental Breakfast

8:30 - 9:30 a.m. The War for Talent in Banking: Post-Pandemic Update

Alan Kaplan, Kaplan Partners

Talent continues to be a critical commodity for banks, and next to capital perhaps the most vital. Most bank leaders agree that top talent has many options, and it will be important for community banks to attract experienced senior executives, strong producers and highly skilled Directors to help navigate the future. Community banks often struggle with the dynamics of CEO, senior executive and even Board succession, and these challenges will remain among the most important considerations for institutions that desire to remain independent. The “new normal” of banking will shine an even brighter light on Executive Succession, and not since the Great Recession have talent and good governance been more central to survival. This session will offer best practices for CEO and executive succession management, and touch briefly on the sensitive topic of board succession, highlighting key strategies for long term success including:

- Why Talent Management & Executive Succession Matter Now More Than Ever
- Emergency CEO Succession—No Longer a “Check the Box” After Covid
- Key Skills and Attributes Community Banks will now need in Future Leaders
- Approaches to High Potential Talent Development
- Timelines for CEO and Senior Executive Succession Planning
- The Skills and Leadership Traits Required of Future Bank Leaders
- Current trends in Board Composition, Structure, Demographics & Diversity
- Navigating Board Succession Dynamics—Terms, Tenure & Evaluations

Now more than ever, community banks will need strong executive talent, savvy board leadership and great succession management to survive and thrive over the long run.

Session Sponsored by Kaplan Partners

9:30 – 9:35 a.m. Stretch break

9:35 – 10:50 a.m. DEI

10:50 – 11:00 a.m. Networking Break

11:00 – 12:00 p.m. Keynote Session
Kevin Hancock, Hancock Lumber

12:00 p.m. 2021 Mid-Atlantic CEO Forum Adjourns

**Sessions & speakers subject to change.*