

2023 Conference Agenda

October 19, 2023

Day 1

7:30 – 8:30

Continental Breakfast -Madero Foyer

8:30- 10:00

General Session

Legislative Update

Presented By:

Patrick J. Kennedy, Jr. – Kennedy Sutherland, LLP

William "Dub" Sutherland - Kennedy Sutherland LLP

Jay Heflin – Eide Bailly

*Catherine Fuchs - Policy Director at US Senate Committee on Banking, Housing and Urban Affairs -
Ranking Member Tim Scott*

Lila Nieves- Lee - Staff Director, Senate Banking Committee - Ranking Member Tim Scott

10:00-11:30

General Session

Tax Guidance for Sub S and Community Banks

Presented By:

Steve Cunningham- FORVIS

Paul Sirek- Eide Bailly

Jessica Ambrose - Eide Bailly

Kathy Herbig – Cherry Bekaert

11:45 -12:45 Lunch

Keynote Speaker

The Mindset of Championship Leaders: How to create a Superbowl worthy depth chart

Julie Bell – Chartwell Partners

Scott Petty – Chartwell Partners

1:00 – 1:50

General Session

Active Loan Portfolio Management

Presented By:

Greg Roll- Stifel

1:50 -2:40

General Session

Reducing Pressure Points While Focusing On Difference Makers

Presented By:

Mason Mosby- Stifel

2:50 – 3:40

General Session

Current Sub S Bank valuation metrics and the impact of east and west coast failures on well run and profitable Sub S banks, and how the depressed market for bank stocks has had an impact on community bank merger/acquisition activity.

Tom Mecredy – Hillworth Bank Partners

3:45 – 5:00

General Session

Investment Strategies for Sub S Banks

Presented By:

Terry Robertson-Raymond James

Dan Stimpson- Stifel

Umrai Gill - Performance Trust Capital Partners, LLC

5:15 Wrap Up

5:30- 7:30 Cocktail Reception

October 20,2023

Day 2

7:30 – 8:30

Continental Breakfast -Madero Foyer

8:00-9:00

General Session

Accounting Guidance for Sub S and Community Banks

Presented By:

Charlie Shannon - Moss Adams

Harrison Powers - CLA

Gary Smith - Eide Bailly

9:00 -10:00

General Session

Executive Compensation and Equity Incentive Compensation for Sub S Banks

Presented By:

Patrick J. Kennedy, Jr. - Kennedy Sutherland LLP

William “Dub” Sutherland – Kennedy Sutherland LLP

Ken Derks – NFP

Tyler Brown – NFP

10:10-11:00

General Session

Expert Panel: Sub S Bank Hot Topics

Presented By:

Kristin Flatt – Crowe LLP

Kevin Powers - Crowe LLP

Kathy Herbig – Cherry Bekaert

11:00 – 12:00

General Session

Cyber Governance Trends & The Financial Sector

Presented By:

Jody Westby - CEO, Global Cyber Risk LLC

12:00 Wrap Up

Please note that adjustments may be made to the above agenda.