

Digital Innovations in Today's Banking Environment

AUGUST 31, 2022 | HILTON GARDEN INN SIOUX FALLS SOUTH, SIOUX FALLS, S.D.



SDBANKERS
ASSOCIATION

Educate. Advocate. Grow.

DIGITAL INNOVATIONS IN TODAY'S BANKING ENVIRONMENT

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ABOUT THE CONFERENCE

Technology and innovation have been transforming financial services since long before artificial intelligence and iPhones, and your role as an IT professional is ever-changing, especially in today's environment. The SDBA Digital Innovation's Conference (formerly Technology Conference) is designed to provide support as you keep on top of technology trends, navigate the business of banking, and build and sustain your bank's technology strategy—all to improve access and better serve your customers. This conference will provide you with an opportunity to learn from industry experts, network with colleagues, and visit with exhibitors to see and experience the latest in products and services.

ATTIRE: Business casual wear is recommended for all sessions. Meeting room temperatures and personal comfort zones vary. It is recommended you bring a sweater or jacket to sessions.

HOTEL INFORMATION: Hilton Garden Inn Sioux Falls South | 5300 South Grand Circle, Sioux Falls | 605.444.4500
Ask for a room from the SDBA block to receive the special rate of \$124 per room. The block will be released Aug. 9.

TUESDAY, AUGUST 30, 2022

5:30–6:30 p.m.

Happy Hour!

You made it to Sioux Falls! You're checked in, your vehicle is unloaded, you've responded to your emails and dinner plans are made. Now what? Join the SDBA in the lobby for a chance to connect with colleagues, unwind and prepare for a great conference tomorrow!

WEDNESDAY AUGUST 31, 2022

7:00–8:00 a.m.

Exhibitor Setup

8:00–8:30 a.m.

Registration/Continental Breakfast

8:30 a.m.

Welcome

8:30 a.m.

You Are A Technology Company



Jon Waldman CISA, CRISC, Co-Founder | SBS CyberSecurity & SBS Institute; Chief People Officer, President | SBS Institute; Executive Vice President, IS Consulting | SBS CyberSecurity; Madison, S.D.

If we're being honest, we know our organizations have shifted from performing banking services for a customer and using technology to make that service more convenient to truly operating as a technology company that offers your customer banking services. Look at it this way: if the majority of customer interactions involve some component of technology, whether it's through online banking, mobile payments, other mobile applications, email, internet-based telephones (VoIP), looking up customer information in a CRM or other software, you are a technology company. This session will look at:

- What Does Our Future Hold?
- Embracing Your Technology Company Status
- Changing Your View of Cybersecurity
- Acting Like a Technology Company

9:15 a.m.

Four Essential Data-Management Strategies For Every Bank to Consider



Matthew Sabo, Ph.D., Director and Head of Analytics Delivery | Wipfli LLP, Radnor, P.A.

Banks should be managing data as an asset and using that asset to bring value to their organization. In challenging economic times, banks with a comprehensive data-management strategy gain strategic advantages over their competitors. In this session we will review why every bank should consider the following data-management strategies to gain the most value from their client data:

- Cloud Data Management to Secure Protected Client Information
- Master Data Management to Better Leverage Client Relationships
- Data Warehousing to Improve Portfolio Management and Regulatory Compliance
- System Data Integration to Gain Operational Efficiencies

10:00 a.m.

Exhibitor Showcase

10:10 a.m.

Break with Exhibitors

10:30 a.m.

Tech Talks

Take part in this fast-paced session where you can learn from your colleagues on a variety of hot topics. This facilitated session will provide an opportunity to share ideas, ask questions and learn from one another in a fun, relaxed environment.

11:15 a.m.

Exhibitor Showcase

11:25 a.m.

Cybersecurity in the Year 2022



Jim Edman, *Cybersecurity Advisor | Department of Homeland Security - Cybersecurity & Infrastructure Security Agency (CISA), Pierre, S.D.*

Cybersecurity impacts individuals in every aspect of today's world. Smartphones, social media, news, apps, texting, email and many other facets of our society are impacted by technology. The session will cover recent developments in cybersecurity and recommendations to protect your services as well as what CISA can offer your organization.

12:10 p.m.

Lunch with Exhibitors

12:55 p.m.

Exhibitor Showcase

1:05 p.m.

The Digital Transformation of Security: Improve Security and Business Intelligence Through Cloud-Enabled, Data-Driven Strategies



Jeremy McConnell, *Business Development Manager, Digital Transformation | Convergent, Dallas, T.X.*

Businesses are migrating their on-premise solutions and applications to the cloud at a rapid pace and the migration of electronic security should be on your technology roadmap. Cloud-enabled solutions provide businesses with a better user experience, accessibility, high availability, and immediate access to open API integrations. Integrations such as Microsoft AD, Azure AD, Okta, Microsoft Teams, and Slack make security system deployment and communication secure and instant. While removing the need to manage on-premise environments, cloud solutions operate with incredible uptime in certified secure and redundant environments.

1:50 p.m.

Navigating the Regulatory Environment



Gale Simons-Poole, *Chief Regulatory Relations Officer | BHG Financial, Syracuse, N.Y.*

This session will cover current regulatory trends and emerging issues for community banks and practical mitigation strategies. Topics to be covered include expectations for oversight of bank vendors & other strategic partners, regulatory expectations for the use of technology in making credit decisions, financial model management, fraud & financial crimes prevention, proposed regulatory initiatives and potential impact to banks.

2:35 p.m.

Exhibitor Showcase

2:45 p.m.

Break with Exhibitors

3:05 p.m.

The Evolving Role of the Technology Professional



Mark Scholl, *MCSE, CISA, CISSP, CEH, Principal | Wipfli LLP, Sterling, I.L.*

The IT professional now and in the future will be quite different than we've seen in the past. The digital transformation has changed how banks manage their information systems and service their customers. The fast-paced evolution of financial institution IT-dependent products and services, along with the increase for outsourcing, require different skill sets from your technology staff.

3:50 p.m.

Close Encounters of the Fintech Kind



Dave DeFazio, *Partner | StrategyCorps, Brentwood, T.N.*

See live demonstrations of trending apps like Robinhood, Cash App, SoFi, and Affirm to better understand the new features that are increasing competitive pressures on today's banking products. We'll share ongoing research which explains the trends - including which mobile features matter most to each generation, from zoomers to boomers. We'll also examine how fintech companies like Acorns are leveraging the subscription society (think Amazon Prime, Costco, Netflix, Spotify) and pioneering new recurring revenue- generating models for financial products and services. What You'll Learn:

- How leading fintech apps are using data in unique ways to create new categories of banking products
- How new features from fintech apps are expanding the definition of financial advice
- How the biggest banks are changing their products to respond to the evolving fintech landscape
- The newest subscription pricing strategies for financial service products

4:35 p.m.

Wrap Up/Adjourn

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REGISTRATION FEE

Fee includes the program, electronic handouts, reception, breaks and meals.

Member: \$425 per person *(includes members of out-of state banking associations)*

Non-Member: \$575 per person

After Aug. 23: add \$30 per person for members; \$50 per person for non-members

On Site: add \$40 per person for members; \$60 per person for non-members

Conference Materials: \$25 per one set of printed materials *(speaker materials/handouts will be provided electronically for free)*

Certificates of Completion will be provided for CE purposes.

Bank _____ Contact Person _____

Address/City/State/Zip _____

Registrants' Names

1. Name _____ Title _____

Address/City/State/Zip _____

Phone _____ Email _____

2. Name _____ Title _____

Address/City/State/Zip _____

Phone _____ Email _____

3. Name _____ Title _____

Address/City/State/Zip _____

Phone _____ Email _____

Submit Registration to South Dakota Bankers Association

Mail: PO Box 1081, Pierre, SD 57501 **Fax:** 605.224.7835 **Email:** events@sdba.com **Online:** www.sdba.com

Number of printed conference materials (\$25 each): _____

Total fees due: \$ _____ ☐ Check enclosed. ☐ Please send me an invoice.

☐ Please bill credit card: ☐ Visa ☐ MasterCard ☐ Discover ☐ American Express

Card Holder's Name _____

Credit Card No. _____ CVV _____

Expiration _____ Zip Code _____

Authorized Signature _____

Cancellation Policy: 100% refund if canceled Aug. 22 or prior. 75% refund if canceled Aug. 22 to Aug. 24.

No refund if canceled Aug. 24 or later. Substitutions allowed at any time.

Special Requests: If you have special requests such as dietary or mother's room requests, please contact Halley Lee at hlee@sdba.com or 605.224.1653 by Aug. 24.

Questions: Contact the SDBA at 605.224.1653 or 800.726.7322 or events@sdba.com.

