

# AGENDA

## Future of Fintech Think Tank

### SPEAKERS



**Justin Hosie**  
Partner - FinTech  
Hudson Cook LLC



**Andrew Endicott**  
Founding Partner  
Gilgamesh VC



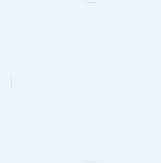
**Grant Butler**  
Partner  
K&L Gates LLP



**Amresh Mathur**  
SVP Digital  
Transformation  
Citi



**Denise Thomas**  
CEO & Co-Founder  
ApplePie Capital Inc



**Erik Stamell**  
CRO  
MileStone Bank



**Peter Bassey**  
SVP Technology  
Portfolio Manager/Cyber  
SME  
Credit Suisse



**Blair Cohen**  
Founder and President  
AuthenticID



**Vas Kodali**  
Former EVP  
Wells Fargo



**Tal Sigura**  
Director of Investments  
FIS Global



**Barbara Negron**  
Senior Director of  
Product Management  
BAAS  
FIS Global



**Jeff Zinn**  
Managing Director,  
Private Credit  
Vida Capital



**Dan McSherry**  
CFO  
Bankers Healthcare  
Group



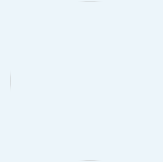
**Ryan Rosett**  
CEO  
Credibly



**Rahul Bhardwaj**  
Deputy CISO  
Kroll



**Keith Donnelly**  
VP, Global Head of Risk  
& Compliance  
Broadridge



**Tony Parrillo**  
Global Head of Security  
Schneider Electric



**Prabha Jha**  
Asc Director Cyber  
Verizon



**Peter Tse**  
Information Security  
Officer  
CTBC Bank

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**November 16, 2023**

Eastern Time

## Welcome & Registration

8:00 AM-8:30 AM

## Morning Networking

8:30 AM-9:00 AM

## Opening Remarks

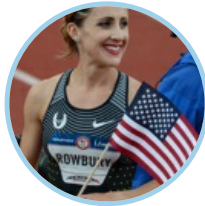
9:00 AM-9:15 AM

## My Olympic Mindset

9:15 AM-9:30 AM

Dissecting the career of a 3xOlympic Athlete and translating sports performance principles to unlock business success.

### PANELISTS



Speaker

**Shannon Rowbury**  
**US Olympian & WSG**  
US Olympics

KEYNOTE

9:35 AM-10:00 AM

## Testing the Limits of Possibility

We are at the ground floor of a new innovation curve—the breakthrough of modern AI—that blows past previous limits of what's possible to build with software. This, coupled with its overlap with the mobile revolution, create an unprecedented moment, and software leaders must build a new set of practices around software development to embrace exponential increases in innovation, but without sacrificing the quality of customer experience that's table stakes in a post-mobile world.

In this session Sauce Labs will leverage their expertise leading companies and research programs at the forefront of these two overlapping innovation cycles to document and explore the convergence of consumer expectations, digital transformation, and innovation in artificial intelligence.

[www.cvisionintl.com](http://www.cvisionintl.com)

PANELISTS



Speaker

Marcus Merrell  
VP of Technology  
Sauce Labs

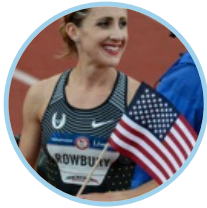
FIRESIDE CHAT

10:05 AM-10:40 AM

Synergy of Leadership, Athlete Mindset, Cybersecurity, and Technology for Business Success

In today's dynamic business landscape, the fusion of leadership principles and the athlete mindset, combined with a strong focus on cybersecurity and technology, offers a potent approach to meet evolving demands. Leadership qualities like adaptability, resilience, and vision complement the discipline, determination, and performance focus inherent in athletes. This connection is particularly relevant in the realm of cybersecurity and technology, where leaders must navigate constant change and cyber threats. Integrating athlete mental skills into technology leadership roles and fostering a culture of cybersecurity resilience is essential. By recognizing this synergy, businesses can equip their leaders to thrive in the face of technological disruptions and security challenges, ultimately ensuring sustainable success in the digital age.

PANELISTS



Speaker

Shannon Rowbury  
US Olympian & WSG  
US Olympics



Speaker

Bob West  
Chief Security Officer,  
Prisma Cloud  
Palo Alto Networks

Coffee Break

10:40 AM-10:50 AM

PANEL

10:50 AM-11:30 AM

# The Promising Future of Artificial Intelligence (AI): Opportunities and Challenges Ahead

The integration of Artificial Intelligence (AI) into IT landscapes has reshaped operational paradigms across diverse industries. AI, combined with machine learning, has not only transformed cybersecurity but also revolutionized IT functionalities. Within IT, automated processes powered by AI, such as natural language processing, facial recognition, and automated threat detection, have streamlined operations and enhanced efficiency. Despite the immense potential, there are challenges, including the development of intelligent malware and attacks leveraging AI capabilities. This double-edged sword necessitates IT professionals to stay ahead of the curve. AI-driven threat detection systems, a crucial facet of modern IT, empower predictive analysis, enabling proactive measures in the event of new attacks. How is your IT department harnessing AI's potential to optimize operations, innovate processes, and foster a tech-forward organizational culture?

## PANELISTS



Chair

**Vas Kodali**  
**Former EVP**  
Wells Fargo



Speaker

**Peter Bassey**  
**SVP Technology**  
**Portfolio**  
**Manager/Cyber SME**  
Credit Suisse



Speaker

**Jim Rutt**  
**CIO**  
The Dana Foundation



Speaker

**Chris Manteria**  
**CTO**  
Coldwell Banker  
American Heritage Real  
Estate (Anywhere Real  
Estate)



Speaker

**Rohit Agrawal**  
**Global Head of Hybrid**  
**Cloud**  
Siemens Healthineers

FIRESIDE CHAT

11:35 AM-12:05 PM

## Revolutionizing Fintech: The Transformative Power of Banking as a Service for Businesses

Banking as a Service (BaaS) has emerged as a game-changer for fintech businesses, offering the integration of financial services directly into their platforms. This abstract explores the strategic implications of BaaS for businesses, driven by technological advancements, evolving customer preferences, and the open banking framework. It underscores how BaaS can expedite innovation, enhance customer engagement, and broaden financial access. However, the abstract also underscores the need for businesses to address security, regulatory compliance, and heightened competition. Through real-world examples and industry insights, this abstract underscores BaaS's pivotal role in reshaping

fintech business models, fostering greater connectivity, and customer-centricity.

## PANELISTS



Chair

**Grant Butler**  
Partner  
K&L Gates LLP



Speaker

**Barbara Negron**  
Senior Director of  
Product Management  
BAAS  
FIS Global

## Networking Lunch

12:15 PM-1:15 PM

FIRESIDE CHAT

1:15 PM-1:50 PM

## Enhance And Optimize The Customer Experience

As the world continues to recover from the COVID-19 pandemic, it is crucial for CIOs to prioritize enhancing and optimizing the customer experience. With customers relying heavily on digital channels and remote interactions, the customer experience has become even more critical in driving engagement, loyalty, and ultimately, business growth. CIOs must leverage data analytics, digital technologies, and cross-functional collaboration to develop and execute customer-centric strategies that address evolving customer needs and preferences. By providing a seamless and personalized customer experience across all touchpoints, CIOs can build brand loyalty and trust in a post-pandemic world, driving long-term business success. In today's competitive landscape, the CIOs who successfully prioritize and enhance the customer experience will be the ones who thrive.

## PANELISTS



Chair

**Rahul Bhardwaj**  
Deputy CISO  
Kroll



Speaker

**Ivan Durbak**  
CIO  
BronxCare Health System



Speaker

**Kathleen Hurley**  
CIO  
Sage Inc

PANEL

1:55 PM-2:40 PM

# Navigating the Future of Trust in Fintech and Banking: Building Confidence in a Digital Financial Landscape

In an era marked by rapid technological advancements, the future of trust in fintech and banking hinges upon the crucial task of building confidence in a digital financial landscape. As digitalization continues to transform the financial sector, ensuring security, transparency, and reliability becomes paramount. Fintech innovations such as mobile payments, blockchain, and artificial intelligence hold immense potential for greater efficiency and accessibility, but they also expose users to new vulnerabilities. Therefore, financial institutions must adopt robust cybersecurity measures and stringent regulatory frameworks to safeguard customer data and transactions. Additionally, educating consumers about the benefits and risks of digital finance can empower them to make informed decisions and foster trust in these emerging technologies. By proactively addressing these challenges, the fintech and banking industries can forge a path towards a future where trust is the bedrock of a seamless and trustworthy digital financial ecosystem.

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Speaker

**Keith Donnelly**  
VP, Global Head of  
Risk & Compliance  
Broadridge

## Networking Break

2:40 PM-3:05 PM

## Is Tanium Right? Let's Fix security.

3:05 PM-3:20 PM

Tanium's series of full page Wall Street Journal ads led with headlines such as WE WILL SPEND \$160B THIS YEAR ON SECURITY SOLUTIONS THAT ARE FAILING TO PROTECT US and WHY IS CYBERSECURITY GETTING WORSE? The fact is, most security technology is built on one flawed assumption that dates back to the seventies. Meanwhile, a technology and methodology built on a different assumption has been hiding in plain sight ever since it was invented around the same time. Learn how accountability-based security will restore security in your organization.

PANELISTS



PANELISTS



Speaker

Wes Kussmaul  
CIO  
Authenticity Institute

PANEL

3:20 PM-4:05 PM

Fintech-Bank Innovation: Transforming Finance Through Alignment and Collaboration

Over the past decade we've witnessed a dynamic shift in the fintech-bank relationship, from rivals to allies. Discover how this evolution has been made possible through focused alignment of interests, enhanced transparency, and maintaining a clear line that ensures fintech product offerings remain outside the traditional banking realm while at the same time adhering to the risk and regulatory needs of banking. We'll delve into the intricate balance of serving customer needs without disrupting each other's business models. Learn about who truly owns the customer in this new financial landscape and how fintechs and banks can innovate new product offerings together to capture greater market share. This session promises an in-depth look at the ever-evolving fintech-bank partnership and how it's reshaping the future of finance.

PANELISTS



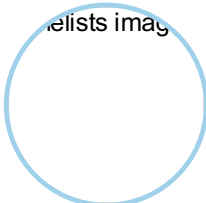
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CRO  
MileStone Bank



Speaker

Ryan Rosett  
CEO  
Credibly



Speaker

**Dan McSherry**

**CFO**

Bankers Healthcare  
Group

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## Networking Break

4:20 PM-4:45 PM

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## Building a Cyber Resilient Culture

4:45 PM-5:00 PM

The ability of an organization to prepare for, respond to, and recover from cyber threats. A cyber-resilient organization can adapt to known and unknown crises, threats, adversities, and challenges.

### PANELISTS



Speaker

**Kenneth Townsend**

**Global CISO**

Ingredion

PANEL

5:05 PM-5:50 PM

## Internet of Things

The Internet of Things (IoT) is a network of physical devices that communicate and exchange data, creating new opportunities for businesses and consumers alike. However, in 2023, the increasing adoption of IoT devices will pose new security risks. Cybercriminals are becoming more adept at exploiting vulnerabilities in IoT devices, which can result in data breaches, unauthorized access, and privacy violations. It's essential for businesses to prioritize security measures such as strong authentication protocols, regular software updates, and network segmentation to minimize the risk of an IoT-related security incident. Additionally, businesses should implement comprehensive incident response plans to quickly and effectively respond to a potential IoT-related attack.

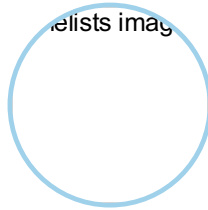
### PANELISTS





Speaker

**Edmond Mack**  
**CISO**  
Cencora



Speaker

**Tony Parrillo**  
**Global Head of Security**  
Schneider Electric



Speaker

**Prabha Jha**  
**Asst Director Cyber**  
Verizon

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**Closing Remarks & Raffle Giveaway**

**5:50 PM-6:00 PM**

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**Cocktail Hour**

**6:00 PM-7:00 PM**

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