

## ANNUAL CONVENTION

JUNE 29-JULY 1 \* SUNRIVER, OREGON

*Into the Great Wide Open*

## AGENDA

## Monday, June 29

- 10:30 – 12:30 **Synergy Board Meeting & Lunch**  
 12:00 – 1:00 **WBA PROs Board Meeting**  
 1:00 – 2:30 **CareerWork\$ Board Meeting**  
 2:00 – 5:00 **IBA Board Meeting**  
 2:30 – 4:30 **OBA Board Meeting**  
 3:00 – 4:00 **NBA Board Meeting**  
 3:00 – 5:00 **WBA Board Meeting**  
 3:00 – 6:30 **Convention Registration Desk Open**  
 4:30 – 6:30 **Opening Reception with Exhibitors**

## Tuesday, June 30

- 7:00 – 5:00 **Convention Registration Desk Open**  
 7:00 – 8:00 **Breakfast & Networking with Exhibitors**  
 8:00 – 12:45 **General Session**  
 8:45 – 9:35 **Economic Outlook**  
*Dr. Lindsey M. Piegza, Managing Director & Chief Economist, Stifel Financial*

Lindsey Piegza will provide an overview of the current economic landscape and its implications for future growth, interest rates, and monetary policy. Her remarks will explore key macroeconomic trends shaping consumer spending and investment, recent monetary and fiscal policy developments, and the potential economic impacts of a shifting global and political environment.

- 9:35 – 10:30 **Road Map to the 2026 & 2028 Elections**  
*David Wasserman, Senior Editor & Elections Analyst, The Cook Political Report with Amy Walter*

Following the 2024 elections and the return of unified Republican control of the White House and Congress, David Wasserman will examine the evolving U.S. political landscape and its implications for policymaking in the years ahead. In a strictly nonpartisan discussion, he will explore key Senate, House, and gubernatorial races, assess the strategic positioning of both parties, and consider how voter sentiment and campaign dynamics may shape the next election cycles. Drawing on extensive engagement with candidates and strategists across the political spectrum, his remarks will highlight emerging trends and potential shifts that will influence American politics moving forward.

- 10:30 – 11:00 **Break with Exhibitors**

- 11:30 – 12:25 **The Weight You Cannot See: The Hidden Work of Leadership in a High Pressure Industry**  
*Christopher Thompson, Founder, Core Inclusive Consulting*

Christopher Thompson will reflect on the often unseen responsibilities carried by today's leaders and the internal demands of leading through pressure, complexity, and change. Drawing on real-world leadership experience, this session will explore resilience, clarity, and confidence as essential elements of effective leadership, with particular relevance for banking leaders balancing organizational performance with the well-being and stability of their teams.

- 12:30 – 2:00 **Lunch**  
 2:00 – 3:30 **Breakout Sessions**

- Defending Deposits: Executive Strategies for Managing Cost of Funds Without Sacrificing Margins**  
*Jason Elder, Performance Trust Capital Partners*

For banks, deposit strategy has become a CEO and CFO level priority as margin pressure persists and competition for liquidity intensifies across banks, credit unions, and non bank alternatives. This session focuses on how executive teams are setting clear strategic guardrails around pricing, funding mix, and balance sheet flexibility, rather than reacting tactically to market pressure. Attendees will explore how banks are aligning deposit strategy with broader profitability, growth, and risk objectives, drawing lessons from recent liquidity stress to protect margins while preserving optionality for future strategic moves.

- Stablecoins: The Future of Payments**  
*Olivia Haller, Cornerstone Advisors*

This session aims to cut through the hype surrounding stablecoins, breaking down the latest happenings in the marketplace with the GENIUS Act, use cases, and potential banking disruption.

- Winning the Next Generation of Business Banking Clients'**  
*Jen Dimenna, CSI*

The largest wealth transfer in history is reshaping how banks must connect with the next generation of consumers and small business owners. This session shares actionable ways to engage Millennial and Gen Z consumers, as well as the important Millennial-run businesses, through high-tech, high-empathy service models that emphasize transparency, social impact, and mobile-first convenience.

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- 3:30** **Adjourn for the Day**  
**4:00 – 5:00** **IBA, NBA, OBA & WBA PAC Reception**  
**5:00 – 6:30** **Exhibitor Reception**  
**6:30 – 8:30** **Dinner & Entertainment: An Evening in the Great Wide Open**

### Wednesday, July 1

- 8:45 – 1:00** **Convention Registration Desk Open**  
**7:15 – 8:30** **IBA Breakfast & Annual Meeting**  
**7:30 – 8:30** **NBA Breakfast & Annual Meeting**  
**7:30 – 8:30** **OBA Breakfast & Meeting**  
**7:30 – 8:30** **WBA Breakfast & Annual Meeting**
- 8:45 – 12:00** **General Session**  
**8:50 – 9:00** **Announcements & Exhibitors Drawings**  
**9:35 – 10:00** **Staying Ahead in an Evolving Fraud Landscape**  
*Paul Benda, EVP/Risk, Fraud & Cybersecurity, ABA*

As fraud schemes grow more sophisticated, banks face an ever changing mix of persistent threats and emerging risks. This session provides a comprehensive look at today's most pressing fraud challenges – from traditional scams fueled by social engineering to the rise of AI driven schemes, emerging quantum enabled fraud risks, and the resurgence of check fraud. Participants will gain practical insights into evolving prevention strategies, innovative industry tools, and best practices to strengthen defenses. Together, these topics offer a forward looking view of the tactics reshaping the modern fraud environment and the tools needed to respond effectively.

- 10:15 – 11:05** **The 7 Energies of Leadership: Driving Mission, Vision & Values for Real Results**  
*Kristen Brown, CSP & Bestselling Author*

Kristen Brown's keynote introduces the 7 Energies of Leadership and explores how they influence engagement, performance, and

organizational growth. Through humor, storytelling, and practical insight, the session examines the role of mission, vision, and values in effective leadership, the importance of balancing and directing personal energy, and approaches for creating alignment and momentum—particularly during times of change. The session will equip leaders with practical tools and renewed clarity to strengthen leadership effectiveness, energize teams, and lead with purpose and focus.

- 12:00** **Convention Adjourns**

- 12:45 – 6:30** **Optional Activities\***

*\*Advanced registration required for all optional activities.*

- 12:30 – 3:30** **Whitewater Rafting • Deschutes River**

Transportation provided from the resort to Sun Country Tours – Big Eddy White Water Rafting. Please check in with Phyllis Gurgevich, of the Nevada Bankers Association, outside of the main entrance to the Sunriver Lodge by 12:30 pm.

- 1:30 – 3:30** **Cooking Demo: Tapas & Sangria**

Join us for an interactive, group-style tapas cooking experience designed to bring attendees together in a fun and flavorful setting. Participants will work in teams of 3-4, with all ingredients and tools provided, to prepare classic Spanish-inspired dishes. The hands-on cooking component includes garlic shrimp and patatas bravas. Following the cooking demo, guests will enjoy a hearty tapas spread and 2 glasses of sangria (non-alcoholic option available).

- 1:30 – 6:00** **Golf Tournament • Meadows Golf Course, Sunriver Resort**

We will provide boxed lunches for all golf tournament participants. A hosted beverage cart will be driving the course throughout the day, you may want to be sure to have cash for tips. Snacks and cigars are not hosted so bring cash if you would like either of these.

- 6:30 – 7:30** **Closing Reception & Golf Awards**