

THE FINANCIAL BRAND

April 27-29 | Las Vegas | Forum2020.com

FORUM

Forum 2020 Schedule



PRESENTING SPONSORS



Sunday April 26

12:00 PM

West Convention
Center Foyer

Registration Desk Open

Pick up your conference badge early, before lines get long.

5:00 PM

Marketplace
Exhibit Hall

Opening Night Reception

Come network with **2,500+ of your peers** as you enjoy hot hors d'oeuvres and a hosted open bar until 6:00 pm.

7:00 PM

Ironwood Ballroom

Entertainment: Jay Leno

Don't miss one of the world's most famous comedy legends for this stand-up performance exclusively for Forum attendees. Doors open at 6:30pm.



Monday April 27

7:00 AM

West Convention
Center Foyer

Registration Desk Open

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7:30 AM

Marketplace
Exhibit Hall

Networking Breakfast & Complimentary Espresso

Enjoy a full breakfast buffet as some of the banking industry's most experienced solutions providers share their insights in these sponsored sessions. These presentations are open to all attendees. Seating limited, and available on a first-come, first-serve basis.

7:30 AM

Starvine Meeting
Rooms

Power Breakfast Sessions

Breakfast provided for all attendees. Enjoy a hearty breakfast and pick up complimentary espresso beverages. Menu includes hot dishes, fruits, cereals, fresh juices, and gluten free options.

Monday April 27

9:00 AM

Ironwood Ballroom

Opening Keynote: Steve Young and Jerry Rice

The two former teammates will be reunited on the Forum 2020 main stage for a unique, candid, unmoderated conversation about **“The Habits of Greatness”**, as they share the secrets that fueled their success, the power of visualization, the principles of inspirational leadership, and how failure can drive you forward.



10:30 AM

Breakouts

Emerging Trends Transforming the Mobile Banking World

Dave DeFazio, Partner at **StrategyCorps**

Ironwood Ballroom

Keys to Brand Transformation in Banking: Differentiation, Authenticity & Relevance

Gina Bleedorn, Chief Experience Officer at **Adrenaline**

Juniper Ballroom 1

From Silos to Synergy: Creating an Integrated Omni-Channel Experience in Banking

Jouk Pleiter, CEO/Founder at **Backbase**

Juniper Ballroom 2+3

Data-Driven Banking for the Digital World

Don MacDonald, CMO at **MX**

Juniper Ballroom 4

11:30 AM

Marketplace
Exhibit Hall

Lunch in the Exhibit Hall

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Lunch & Learn Sessions

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Monday April 27

1:00 PM

Breakouts

Digital Growth Marketing Strategies That Generate Maximum ROI

James Robert Lay, CEO/Founder at **Digital Growth Institute**
Ironwood Ballroom

Monetizing the Untapped Growth Potential in Your CX Strategy

Paul Berg, Senior Managing Consultant at **Gallup**
Juniper Ballroom 1

Building Financial Brands & Creating Emotional Connections in a Digital-First World

Dipanjan Chatterjee, VP & Principal Analyst/Financial Vertical at **Forrester**
Juniper Ballroom 2+3

Google Deciphered: Unlocking Search Engines & the Secrets of SEO

Micheal Bertini, Director of Search Strategy at **iQuanti**
Juniper Ballroom 4

1:00 PM

Live Demos

Harvest - Goalkeeper

Drew Sievers, CEO of **Harvest**
Starvine 10



Goalkeeper is a simple API-powered, white label tool allowing your customers to save for anything and everything, making it easy for them to get into the habit of saving. In this demo, see how **Harvest's** automated goals-based savings product helps you retain deposits that are being siphoned off by fintechs.

Fiserv - Getting Personal with Digital Transformation

Colin Murphy, VP/Product Marketing and Consumer Adoption at **Fiserv**
Anne High, Director, Advisory Services for Financial Institutions at **Fiserv**
Eric Smith, Head of Financial Institution Sales at **Fiserv**
Starvine 11



Learn how to create one-of-a-kind digital experiences that drive deeper consumer engagement and profitability to your institution. This demo will show you how to craft tailored, real-time messages using fast and secure communication channels. You'll also see how you can reach on-the-go consumers with new innovative technologies like biometric authentication and augmented reality.

Monday April 27th

2:00 PM
Ironwood Ballroom

Retail Delivery Panel: Branches, Digital Channels & The Omni-Channel Experience

PANELISTS:

Josephine Moran, EVP/Head of Retail Banking with **Provident Bank**
Jennifer Smith, VP/Director of Branch & ATM Distribution at **Flagstar Bank**
Çagrı Süzer., Head of Retail at **BBVA USA**

MODERATOR:

Jon Voorhees, Retail Banking Strategy Expert with **Peak Performance Group**

The customer journey has become extremely complex. People skip between branches, contact centers, online, mobile and social media channels. In such a dynamic environment, how do you deliver a seamless, integrated experience across all touchpoints? What is the role of branches in this increasingly digital-first world — how many do you need, and how big should they be? What about online account opening? Chatbots? New branch technologies? Universal bankers? This panel discussion will give you the insights you need to refine and sharpen your retail delivery strategy.

2:00 PM

Breakouts

From Discovery to Purchase: Removing Friction in Financial Services

Deepanjan De, Head of Financial Services at **Facebook**
Juniper Ballroom 1

10 Strategies to Make Your Marketing Campaigns Immediately More Effective

Nancy Harhut, Co-founder and Chief Creative Officer at **HBT Marketing**
Juniper Ballroom 2+3

Mining for Gold: Turning Data Into Dollars

Dr. Sean Payant, Chief Consulting Officer at **Haberfeld**
Juniper Ballroom 4

Banks and credit unions that register now will **save \$905.00**, and get a **free upgrade to a Gold Pass**. Past attendees save even more!

CLICK TO
REGISTER
NOW

ENDS SUNDAY
APRIL 26TH

Monday April 27th

2:00 PM

Live Demos

Yext's Search Experience Cloud

Shane Closser, Head of Industry, Financial Services at **Yext**
Starvine 11



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3:00 PM

Ironwood Ballroom

Expert Panel: Digital Transformation, Innovation & Technology

PANELISTS:

Corey LeBlanc, Chief Digital & Innovation Officer at **Origin Bank**

Erin Hennessy, Chief Innovation & Marketing Officer at **United FCU**

Jeremy Balkin, Head of Innovation at **HSBC**

Joshua Winstead, Chief Digital Officer at **TIAA Bank**

MODERATOR:

Jim Marous, Co-Publisher at **The Financial Brand**

How are retail financial institutions tackling digital transformation, and how far along should they be in their journey? What new technologies are critical to delivering the digital experience consumers expect? How can banking providers respond to pressure from fintechs and digital-only challengers, and how can they foster a culture of innovation? What are the opportunities for open banking and APIs? What are the practical applications for artificial intelligence, machine learning, and other advanced data analytics capabilities? Get the answers to these questions and more in this riveting panel discussion.

Monday April 27th

3:00 PM

Breakouts

Financial Branding & Behavioral Science: Crafting Your Strategy in Five Steps

Kai D. Wright, Author & Lecturer at **Columbia University**
Juniper Ballroom 1

Social Media Growth Strategies for Financial Marketers

Ekaterina Walter, Author, TedX Speaker and Social Media Evangelist
Juniper Ballroom 2+3

3:00 PM

Live Demos

Q2 SMART & Q2 Gro

Ryan O'Shaughnessy, Director, Product Management at **Q2**
Lee Willis, Sr. Director, Product & Sales Engineer at **Q2**
Starvine 10

Q2

Q2 SMART is an accurate targeting and messaging platform that helps financial marketers improve their marketing efforts by recommending the right products to the right users at the right time. **Q2 Gro** provides no-hassle, no-abandonment onboarding for the mobile-first customer. This demo will show you how to create a user journey that begins with a tailored, targeted **Q2 SMART** marketing offer for a product followed by a seamless digital onboarding experience through **Q2 Gro**.

TimeTrade Scheduler

timetrade®

Matt Theodoros, Senior Manager, Solutions Architecture at **TimeTrade**
Starvine 11

TimeTrade Scheduler is the most advanced appointment scheduling and in-location queue management platform in the world. See how **Scheduler** gives customers the ability to connect with your brand and your employees at the peak of their interest, engaging the right team member in the right location at the right time. See **TimeTrade** in action and discover how to solve the challenge of scheduling multiple locations, staff, and resources from one highly scalable and secure solution.

Save \$1,445.00 per person when you register as a group of three or more - **55% off** the regular rate!

CLICK TO
REGISTER
AS A GROUP

Monday April 27th

4:00 PM

Ironwood Ballroom

ForumX Talks

The New Rules of Marketing

Omar Johnson, Former VP/Marketing of **Apple** and CMO of **Beats by Dre**

As CMO and one of the first three employees at **Beats**, Omar Johnson lead brand development, advertising, retail CX, and digital marketing, where he drove explosive growth — helping build a **\$1.1 billion dollar** global icon and category leader. In 2018, **Adweek** named him a “**Brand Genius**”, and in 2016 **Business Insider** distinguished him as one of the “**Most Innovative CMOs**”. At the **Forum 2020**, hear how Omar leverages creative marketing strategies to build brand awareness for the world’s best brands — from **Apple** and **Nike**, to **Coca-Cola** and **Kraft** — and how your financial institution can incorporate similar guerrilla techniques to build market share.



Building The Digital Bank of the Future

Brett King, Futurist, bestselling author, global fintech superstar, and expert on disruption in banking

The banking industry is in trouble. Everything from transactions to identities now live in digital channels. Today, the most efficient models are built on a backbone of **data**, **algorithms** and **artificial intelligence**. But traditional financial institutions haven’t yet figured out how to move beyond their brick-and-mortar roots, leaving every bank and credit union still relying on branch revenue in survival mode. Banking futurist **Brett King** will tell **Forum 2020** attendees how they need to wean themselves from the branch dependent models of yesteryear, and how to build the bank of tomorrow.



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Final Discount

Banks and credit unions that register now **save big** and get a free **Gold Pass**. Includes access to video recordings of all sessions and a **free ticket** to see **Jay Leno's private performance**.

ENDS SUNDAY
APRIL 26TH

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9:00 AM

Ironwood Ballroom

Featured Keynote: Seth Godin

As one of the most sought-after speakers on the planet, you can't afford to miss Seth's powerful keynote at the **Forum 2020**. He'll explain how marketing is broken, what you need to do to build a breakthrough brand, and how everyone — not just the CEO — can engage, lead and connect.



Tuesday April 28

10:30 AM

Makeovers

Brand Identity

Josh Streufert, Creative Director at **Strum**
Karen McGaughey, VP/Client Services at **Strum**
 Ironwood Ballroom

Client - Frontwave Credit Union:

Jennifer Topzand, Director of Marketing
Randi Brooke, SVP/COO
Wendy Rodriguez, Director/Branch Operations
Todd Kem, CMO

Follow the journey of one financial institution as they undergo a brand transformation involving a name change and re-branding. You'll see what it takes to fight for distinction and relevance in one of the most highly competitive and over-banked regions in the United States. In the course of the makeover, we'll explore the importance of culture and the shifts required to implement a new brand with resonance. We'll share what worked, what didn't and what was learned along the way.



Branch Experience & Design

Danielle Havlicek, Senior Creative Director at **La Macchia**
Tim Klatt, Director of Retail Strategy at **La Macchia**
 Ironwood Ballroom

The concept of 'Branch of the Future' has long been debated. There have been endless discussions about the evolution of the branch – from the ideal size of a brick and mortar location, to what Millennials are wanting from your branch, to what the best solution is for transaction-focused technology (Recyclers? ITMs? Smart ATMs?). What if we stopped thinking about branch evolution based on a reaction to industry trends and changed its fundamental function? What if the branch became a source of knowledge and inspiration: for both consumers and the financial institutions themselves? What if, instead of focusing on being just a customer selling point, the branch became a pillar of organizational learning; continually providing operational, experiential, and other critical feedback to allow the bank or credit union to adapt – in real time – to their consumers' needs?



11:30 AM

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Tuesday April 28

1:00 PM

Breakouts

Banking Transformed: Leadership Strategies in Times of Digital Disruption

Jim Marous, Co-Publisher at **The Financial Brand**
Ironwood Ballroom

Innovative Digital Marketing Strategies for Acquisition, Growth & Retention

Lincoln Parks, Digital Marketing Expert and Banking Thought Leader
Juniper Ballroom 1

Gen Z, Millennials and The Future of Banking

Meredith Ferguson, Managing Director at **DoSomething Strategic**
Juniper Ballroom 2+3

1:00 PM

Live Demos

C2 by Bluespire

Kim Tamble, SVP Sales Operations and Marketing at **Bluespire**
Tyler Dow, Interactive Project Manager at **Bluespire**
Starvine 10



C2 is a SaaS martech scalable platform that integrates a content management system with a lead management system. **C2** allows users to create, showcase, measure, track, manage and share KPIs in a single, easy-to-implement and easy-to-use solutions. See how **C2** can help you link and track addressable traditional media and digital campaigns with attribution and performance. You'll learn how to improve your marketing ROI by measuring and tracking results by cross-selling customized, targeted products.

Coconut Software

Nathan Poellet, Senior Director of Product at **Coconut Software**
Starvine 11



Coconut Software is an omnichannel customer engagement platform that allows financial customers to book meetings with advisors online, over the phone and in branch for the exact service they want at the time and location that works best for them. You'll see how to bridge the gap between advisors and customers using real-time data collected during every phase of the customer journey, with detailed performance reports on traffic, channel usage and more shown on a simple dashboard.

Tuesday April 28

2:00 PM

Ironwood Ballroom

Expert Panel: The ROI of Social Media in Banking

PANELISTS:

Craig Mauro, Social Media Specialist at **Bethpage FCU**

Sara Reiner, Social Media & Content Strategist at **BECU**

Courtney Oldendorf, Social Media Specialist at **ORNL Federal Credit Union**

Saloni Janveja, Exec. Marketing Director, Social Media & Marketing Innovation at **Ally Financial**

MODERATOR:

Meredith Olmstead, CEO & Founder at **FI GROW Solutions**

Few topics are more controversial than the role of social media in banking, and the return on its investment. Bank and credit union CEOs want to hear about new loans and accounts, not new Likes and Followers. Is social media just a tool for PR and community outreach? With so much energy devoted to content creation, how do financial marketers justify their efforts? How can social media be used to facilitate sales, answer people's questions, and resolve service issues? How do you manage your online reputation through ratings and reviews on platforms like Yelp!? Attend this session to see how other financial marketers are getting their C-suite on board with KPIs that prove the value of social media.

2:00 PM

Breakouts

Inside the Hearts & Minds of Consumers:

Revolutionizing Your Service Experience Through Customer Centricity

Andrea Olson, Author, TedX Speaker & CEO at **Pragmadik**

Juniper Ballroom 1

The Financial Marketer's Data Roadmap:

The Blueprint for Building Better Relationships

Ron Shevlin, Director of Research at **Cornerstone Advisors**

Juniper Ballroom 2+3

Beyond the Sea of Sameness:

Rethinking the Role of Brand in Financial Services Marketing

Mike O'Toole, President at **PJA Advertising + Marketing**

Juniper Ballroom 4

Tuesday April 28

2:00 PM

Live Demos

The Agile Marketing Platform for Financial Institutions from Prisma Campaigns



Felipe Gil, Co-Founder and CEO at **Prisma Campaigns**
Starvine 10

This demo will show you how you can easily orchestrate omnichannel campaigns, reducing time to market and operational costs with a unique, agile marketing platform leverages existing customer data to deliver personalized messages through all digital channels — web, mobile, online banking, email, SMS and others. Learn how to implement digital customer journeys that increase revenues and improve conversion rates by personalizing communications at scale.

Close the Loop On Your End-to-End Experience by CUNA Mutual Group



Ronny Chapman, President of **Compliance Systems**
Starvine 11

Compliance Systems, a CUNA Mutual Group Company, offers state-of-the-art data analytics and configurable document software. This innovative technology transforms compliance and transaction management by streamlining processes and driving efficiencies across business areas. Learn how these improvements can help you re-engage with customers more quickly through their channel of choice and enhance the experience you deliver.

3:00 PM

Ironwood Ballroom

CMO Panel: Strategic Marketing Challenges in The C-Suite

PANELISTS:

Elizabeth McLaughlin, AVP/Marketing **Affinity FCU**

Becky Smith, CMO **SECU**

Emily Abbas, SVP/Marketing and Communications **Officer Bankers Trust**

Steven Miley, SVP/Strategic Marketing **Dime Community Bank**

MODERATOR:

Joe Sullivan, CEO **Market Insights**

What is the future of financial marketing? Join this panel of senior-level financial marketers to find out how digital transformation is redefining the role of CMOs in banking. Where does IT stop, data analytics start, and when should marketing take the lead? Should CMOs oversee CX? What martech tools and new technologies are essential, and which ones should stay on the wish list (for now)? How should CMOs be segmenting, automating and personalizing their campaigns? And how can CMOs centralize and manage data to build a digital growth strategy that balances consumers' privacy concerns? In this session, your peers will explain how they are solving the biggest challenges in financial marketers today.

Tuesday April 28

3:00 PM

Breakouts

Transforming Financial Wellness Programs Into Revenue-Generating Business Strategies

Laura Barger, CMO at **Financial Health Network**
Juniper Ballroom 1

Building Data-Driven Financial Brands That Thrive in The Experience Economy

Betty Moon, Senior Principal/Financial Services Industry Executive Advisor at **SAP**
Juniper Ballroom 2+3

Digital Transformation Lessons Through the Eyes of a CEO

Joe Mirachi, CEO/President at **Launch Federal Credit Union**
Juniper Ballroom 4

3:00 PM

Live Demos

Episerver Experience & Data Management

Richard Cockshott, Associate Vice President at **Episerver**
Starvine 10



Financial institutions want to deliver 1:1 experiences, but customers and regulators are increasingly limiting your ability to collect data. This demo will show you how to marry humanized online experiences with data regulation. Learn how financial services organizations are using **Episerver** and **Extractable** to manage that balance and bring value to customers without losing their trust.

eGain Sales Advisor™

Evan Siegel, VP Financial Services AI at **eGain**
Starvine 11



Tired of hiring, training, and firing sales reps? Worried about compliance? **eGain Sales Advisor™** is the answer. This demo will show you how conversational AI can guide interactions while ensuring regulatory compliance and auditability. You'll see a virtual assistant and coaching with a banker bot, powered by Natural Language Processing, Machine Learning, and AI reasoning in action.

Tuesday April 28

4:00 PM

Ironwood Ballroom

ForumX Talks

Unstoppable Cultures: Creating and Sustaining Organizations of Enduring Greatness

Ginger Hardage, Former SVP of Culture & Communications at **Southwest Airlines**

Ginger spent 25 years spearheading internal culture at **Southwest**. Her work building and sustaining the organization's legendary reputation earned the airline the distinction as one of **Fortune's "Top 10 Most Admired Companies in the World"**. She is recognized as one of the world's foremost authorities on building and sustaining organizational culture, and was selected as one of the **"Top 50 Most Powerful Women in Public Relations"** by PRWeek. In 2015, she was inducted into the **Public Relations Hall of Fame**. At the **Forum 2020**, Ginger will tell you how to overcome the internal hurdles holding your organization back by creating your own innovative culture with inspiring new, never-been-done before ideas.



Using Technology and Innovation to Disrupt Banking

Jay Sidhu, Founder & CEO of **BankMobile**

Jay Sidhu is a legend in the banking industry. Over his 20-year career at **Sovereign**, the bank grew to become the **17th largest institution** in the US, with over \$90 billion in assets. After retiring as Sovereign's CEO in 2006, Jay purchased a troubled bank with only \$250 million in assets and has since transformed it into a **\$12 billion powerhouse**. His latest venture, **BankMobile**, is a full-service banking platform with its own innovation team building proprietary technology. In fact, 40% of its employees focus on tech and UX design. At the **Forum 2020**, you can hear the story behind the launch of BankMobile and how this strategy helped it become one of the largest and fastest growing digital banks in the world.



5:00 PM

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Wednesday April 29

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Center Foyer**Luggage Storage**

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9:30 AM

Ironwood Ballroom

**Featured Keynote:
Jeremy Gutsche**

CEO of Trend Hunter, the world's #1 most popular trend spotting firm, New York Times bestselling author, and one of the world's leading authorities on innovation and change management. Jeremy will arm you with big picture takeaways and practical steps in a mind-blowing keynote that will show you how to adapt to the macroeconomic forces and major trends that are reshaping banking.



See Who's Coming to the **Forum 2020**

Over 2,500+ of the best and brightest in banking will be there when the **Forum 2020** kicks off in April. Will you be there?

[SEE ATTENDEE LIST](#)

Wednesday April 29

10:30 AM

Ironwood Ballroom

7-in-7 Talks

Featuring seven different financial institutions, each with seven minutes to showcase a big branding story or marketing case study that had a real impact on their bottom line.

How Artificial Intelligence is Revolutionizing Banking

Donna Bailey, VP of Operational Excellence at **Wells Fargo**

Relationship Banking Strategies for a Mobile-First World

Linda Duncombe, EVP Marketing & Product Strategy at **City National Bank**

Banking on Women: A Growth Focused Business Segment

Liz Lancaster McIntye, VP/Director of Social Media at **Renasant Bank**

Leveraging Brand Identity to Forge Deeper Connections With Customers

Gina Proia, EVP/Chief Marketing & Communications Officer at **CIT**

How CX is Driving Strategy in the Digital Age

Katie Miller, Senior Vice President at **Navy Federal Credit Union**

How to Overcome Barriers With New Digital Marketing Initiatives

Scott Spjut, AVP/Digital Content at **Fifth Third**

Rebranding Blitz: Synchronizing a New Logo, Website & Ad Campaign

Erin Dady, CMO at **Bremer Bank**

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1:00 PM

Ironwood Ballroom

ForumX Talk

Inspiring Creativity

Matt Luhn, Former Lead Storyteller at **Pixar Studios**

With over 25 years of experience as one of Pixar's storytellers, Matthew Luhn is a master at creating dynamic narratives that engage audiences. His credits include **"Toy Story"**, **"Monsters Inc."**, **"Finding Nemo"**, **"Cars"**, and **"The Simpsons"**. Matthew's engaging and action oriented **Forum X** talk will provide strategies on how to create a culture that encourages and nurtures new ideas. He will demonstrate how to empower relationships and build trust through authentic communication. Senior leaders will learn how to inspire their team by leveraging the persuasive power of great storytelling, and how to craft stories that make their brand stand out.



2:00 PM

Ironwood Ballroom

Closing Keynote: Martha Stewart

An international branding superstar, media mogul, and best-selling author — an undeniable force in the business world, named as one of **Forbes "100 Greatest Living Business Minds"**. At the **Forum 2020**, Martha will share her secrets to building powerful, world-class brands, offering attendees her advice, insights and business knowledge accrued through her fabled career as one of the world's most innovative entrepreneurs.



3:00 PM

Conference Concludes

Most attendees stay after the conference is over to network, have dinner and enjoy a night on the town. We recommend catching your flight home Thursday morning.