

*Independent Bankers Association of New York State presents*

Sept. 12–14, 2022

## Executive Bank Symposium

*Community Banks Go Lakeside to “Wave”  
Goodbye to Summer & “Fall” Into Fall*

**NEW VENUE!**

**NEW FORMAT!**

**NEW AGENDA!**

### **WHO SHOULD ATTEND?**

- ⇒ All C-Suite Officers
- ⇒ Senior Managers
- ⇒ Directors & ALCO Teams

**EARN UP TO  
6.0  
CPE CREDITS**

IBANYS has been authorized  
by the NYS  
Department of Education to  
award continuing professional  
education (CPE) credits.

**Surfside on the Lake Hotel &  
Suites**

**400 Canada Street  
Lake George, NY 12845**

## Overview

This year's meeting will bring a new look to IBANYS Executive Bankers Symposium. New Venue in beautiful, historic, charming Lake George; New Format will have roundtable, interactive discussions on three important topics community banks face today: 1.) Economic Conditions, 2.) Strategy and 3.) Fintech. New Agenda has one topic each day for a 2.5 hour session starting Monday after lunch, Tuesday morning and Wednesday morning. Each session will be interactive with a roundtable discussion moderated by IBANYS. A great time to share your views, hear thoughts from your colleagues and fellow bankers and gain insight from our subject matter experts on each topic.

Attendees have time to explore beautiful Lake George on Tuesday afternoon on their own or join your colleagues with activities planned by IBANYS. It will be a great time.

All C-level suite, Senior Management and Bank Boards are welcome.

Please join us as we *“Wave” Goodbye to Summer & “Fall” Into Fall.*

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## Agenda

### Monday, September 12, 2022

11:30–1:00 p.m.—Guest Arrive—Lunch—The Cabana—Overlooking beautiful Lake George

1:00–1:15 p.m.—Welcome & Introductory remarks—John Witkowski, President & CEO, IBANYS

1:15–4:00 p.m.— **The Economy & Looking Into the Future**

**Marty Mosby, Managing Director—Bank Advisory & Strategic Services – Stifel**  
(there will be a 15 minute break)

5:00 –6:00 p.m.—Cocktail hour w/Hors D’oeuvres—The Cabana

6:00–8:00 p.m.— Dinner

### Tuesday, September 13, 2022

8:00 – 9:00 a.m. – Breakfast/networking

9:15 – 11:45 a.m. – **To Survive or Thrive? Strategies to Implement Today, to Be Relevant Tomorrow**

**Jeff Marsico, President – Kafafian Group**

In this moderated session, participants will exchange ideas on the greatest strategic imperatives derived from our membership. After the moderator delivers a brief introduction and information, then it’s all about our participants, tackling each strategy with ideas on what they are currently doing, or intend to do, to be relevant, even important to the emerging demands of our customers. **(there will be a 15 minute break)**

12:00 p.m.—Lunch

12:45–5:00 p.m.— Free Time—Enjoy exploring Lake George or participate in a planned event.

5:00–6:00 p.m. – Cocktails

6:00–8:00 p.m. – Dinner

## Agenda (continued)

Wednesday, September 14, 2022

8:00 – 9:00 a.m. – Breakfast/networking

9:15 – 11:45 a.m. – **Imagineering Innovation in Community Banking**

**Kevin Tweddle, Senior EVP, Community Bank Solutions for Independent Community Bankers of America (ICBA)**

The community banking landscape is changing and keeping up with those changes is more challenging than ever before. Journey through the realm of innovation possibilities available to community banks of all shapes and sizes as together we shape the future. To stay relevant in today's market, community bankers must embrace fintech and the benefits they can provide to a bank's customer base. Finding the sweet spot between high tech and high touch is crucial to surviving and thriving in this exciting new competitive landscape. We will discuss innovation in community banking, how fintech fits into your strategy, a review of the digital and competitive landscapes as well as resources that can help you on your innovation journey. We will also have interactive discussion on a variety of innovation topics to help engage in a dialogue with your peers to discuss ideas and best practices that you can bring back and implement at your own banks. **(there will be a 15 minute break)**

12:00 p.m.—Lunch/Meeting Concludes

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## About the Speakers



**Marty Mosby, Managing Director**

**Stifel Financial, Bank and Equity Strategies**

Marty joined Stifel through the merger with Vining Sparks in 2022. He has been a bank research analyst for over 10 years. He utilizes his past experience of managing a regional bank to cover 20 of the largest U.S. banks. Prior to covering banks, Marty was an executive manager at First Horizon National Corporation where over his 20-year career he served as Chief Financial Officer, Head of Investor Relations and Strategic Planning, ALCO Chairperson and Chief Economist. As CFO, Marty guided First Horizon through four years of Sarbanes-Oxley and directed the Treasury, Tax, Controlling, M&A, Strategic Planning, and Investor Relations Departments. He was ranked first by Integrity Research and Investors' performance, won Bank Analyst Annual Best Investor Relations at a Mid-Cap Bank award twice and was recognized by Investor Relations Magazine for one of the best Roadshows of any mid-sized company. Marty holds a Master's degree in Economics from the University of Pennsylvania and a Bachelor's degree in Economics from the University of Memphis.



**Jeff Marsico, President**

**The Kafafian Group**

Jeff has been with The Kafafian Group since its inception and is a founding shareholder. He oversees and works in all lines of business and areas of expertise, with a focus on strategy, profitability, and financial advisory.

He began his banking career in 1985 and his experience includes: financial institution mergers and acquisitions, consulting and capital formation with Tucker Anthony Sutro Capital Markets (now RBC Capital Markets); retail branch management and merger integration with First Maryland Bancorp (now M&T Bank Corporation); IT and trust operations with Northeastern Bank of Pennsylvania (now PNC Financial Services Group, Inc.).

At The Kafafian Group, he has analyzed and facilitated hundreds of strategy development engagements for community financial institutions, resulting in documented strategic plans to guide client employees and improve performance. He has negotiated, analyzed and advised boards of directors regarding whole bank, branch and fee-based lines of business acquisitions resulting in more than four-dozen successful transactions with over \$2 billion in value.



## About the Speakers (con't)

### Jeff Marsico (con't)

Jeff received his B.A. from the University of Hawaii and his M.B.A. from Lebanon Valley College. Professional education includes the AMIFs Institute, NASD Series 6 and 7, and the U.S. Navy systems administrator designation from the University of West Florida.

He is the author of *Squared Away-How Can Bankers Succeed as Economic First Responders* (Kindle | Paperback | Hardcover). He also serves on the faculty of various state associations' executive development programs. He is a frequent speaker and commentator at industry events, and is a recognized community financial institution blogger.

Jeff interrupted his banking career and served seven years as a Military Intelligence Analyst in the United States Navy, earning three Navy Achievement Medals, the Kuwait Liberation Medal, the Southwest Asia Service Medal, the Combat Action Ribbon, Sea Service Ribbon, and other various commendations. He was a leader in starting the girls' lacrosse program in his community, and is a certified U.S. lacrosse coach.



### Kevin Tweddle

#### Senior Executive Vice President, Community Bank Solutions, ICBA

Kevin Tweddle is senior executive vice president of community bank solutions for ICBA. In this role he provides leadership management and vision for ICBA Services Network's solution-focused subsidiaries and ICBA's member and vendor relations departments. Kevin is responsible for spearheading ICBA's efforts to enhance the franchise value of community banks by providing high-quality products and services that aggregate their collective buying power.

Tweddle will also continue to steer ICBA's innovation strategy and work with ICBA's chief innovation officer to deploy financial technology strategies for the benefit of community banks and work with ICBA leadership to develop impactful, value-added solutions that help community banks seize new market opportunities to meet consumers' evolving financial services' needs.

Tweddle's expanded title reflects increasing responsibilities since joining ICBA in 2017 as group executive vice president, innovation and financial technology, where he pioneered ICBA's innovation strategy, including the successful launch of the ICBA ThinkTECH Accelerator program, in partnership with the Venture Center, as well as the ICBA ThinkTECH Network, powered by FinXTech Connect.

His extensive financial services experience spans more than 33 years and includes executive roles in sales, marketing, accounting and information technology. Tweddle previously served as president of Bank Intelligence Solutions at Fiserv and was an executive at the Bankers Bank in Atlanta, where he was chief financial officer and chief information officer.

Well-respected by industry peers, Tweddle also served as President on the Board of Directors of the Association for Financial Technology and as a member and Chairman of the Financial Institutions Committee of the Georgia Society of CPAs. Tweddle also serves as a Board member and advisor to several fintech companies serving the community banking industry.

Tweddle is a certified public accountant and is a graduate of the Colorado Graduate School of Banking. He holds a Bachelor of Science in business administration and accounting from Stetson University in Deland, Fla.

# Executive Fall Meeting Registration Form



**Dates:** Sept. 12-14, 2022

**Surfside on the Lake Hotel & Suites**  
400 Canada Street  
Lake George, NY 12845

**Complete the form below & mail, or email to:**

**Mail: IBANYS (NOTE NEW ADDRESS)**  
194 Washington Ave., Suite 420  
Albany, NY 12210

**Registration Deadline:** Thursday, September 1, 2022  
**\*No refunds will be given after this date**

**Questions: Contact:** Linda Gregware  
Lindag@ibanys.net or (518) 436-4646

**Registration Fees:** Includes all course materials and meals

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|--|------------------|------------------|------------------|
| <input type="radio"/> <b>Member:</b>     | \$595—1st person | \$495—2nd person | \$395—3rd person |
| <input type="radio"/> <b>Non-member:</b> | \$695—1st person | \$595—2nd person | \$495—3rd person |

**Bank/Company:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City/State/Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Attendee Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Attendee Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Attendee Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Golf: \$125.00 per person.** list each participant & their handicap (12:15 p.m. shotgun start).— Hiland Park Country Club, includes cart, fees, lunch & drink tickets

**Fort William Henry Guided Tour:** \$16.00 per person (approx. 1 hr) (1:00—2:00 p.m.)

**Island of the Narrows Cruise on Lake George :** \$35.00 per person (2 1/2 hours—embark 2:15 leaves port at 2:30 returns at 5:00)

**Name:** \_\_\_\_\_

**Handicap:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Handicap:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Payment**

- My check (made payable to IBANYS) is enclosed  
 Charge       Please Invoice

**Total Registrants:** \_\_\_\_\_ \$ \_\_\_\_\_  
**Total Golfers:** \_\_\_\_\_ \$ \_\_\_\_\_  
**Total Cruise:** \_\_\_\_\_ \$ \_\_\_\_\_  
**Total Fort Tour** \_\_\_\_\_ \$ \_\_\_\_\_  
**TOTAL PAYMENT:** \_\_\_\_\_ \$ \_\_\_\_\_

Visa/Mastercard/AMEX number: \_\_\_\_\_

Cardholder Name: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Billing Address of Card (if different from above): \_\_\_\_\_

CVV (3 digits back of card/AMEX 4 digits on front of card): \_\_\_\_\_

**A block of rooms have been reserved at the Surfside on the Lake. Reservations can be made by contacting the Surfside at (518) 668-2442. Refer to group: Independent Bankers Association. Room cut-off: August 26, 2022. (We cannot guarantee room availability and pricing after this date.) Single/Double rate= \$134.00 ++. WE STRONGLY RECOMMEND YOU MAKE YOUR RESERVATIONS EARLY. THE ROOMS WILL SELL QUICKLY. Cancellations must be made 14 days prior to day of arrival.**