

# TUESDAY

MAY 7, 2024  
Find full session descriptions at [indiana.bank/mega](http://indiana.bank/mega)

9:00 a.m. - 10:00 a.m.  
10:30 a.m. - 11:30 a.m.

DIRECTORS	OPERATIONS & TECHNOLOGY	RETAIL BANKING	RISK MANAGEMENT	SALES & CUSTOMER SERVICE	WEALTH MANAGEMENT
WABASH 2 & 3	ROOM 107-108	ROOM 105-106	ROOM 109-110	WABASH 1	ROOM 111-112
YOUNG & ASSOCIATES	Virtual Innovation <small>Security   Availability   Recovery</small>	ARCHITECTURE + DESIGN	CONTRACTS <small>The Upside of Risk</small>	MIDWESTERN SECURITIES	Federated Hermes
Ten Things Every Community Bank and Its Directors Need to Know Now  Philip Smith <i>Gerrish Smith Tuck</i>	Leveraging AI for Banking Success  Kendra Ramirez <i>KR Digital</i>	Fighting Fraud: Trends and Solutions for Retail Bank Employees  Panel	Third-Party Vendor Management for Banks: Inside the New Guidance  Monica M. Bolin, CERP, NCRM <i>Ncontracts</i>	Customer-Centric Banking: Navigating Success through Journey Mapping  Robert Zondag <i>Wipfli LLP</i>	Navigating the Claims Process  Rodney S. Retzner, William J. Barkimer & Micah J. Nichols <i>Krieg DeVault LLP</i>
Banking Resilience: Navigating Success in Any Economic Climate  Heather Archer Eastep <i>Hunton Andrews Kurth</i>	Guardians Unveiled: Defending Against Ransomware Threats Targeting Community Banks  Milton Bartley <i>ImageQuest</i>	Mining for Gold: Driving Results with Your Data  Robb Rempel <i>Haberfeld</i>	Best Practices for Interest Rate and Liquidity Risk  Luke Mikles <i>The Baker Group</i>	Stop Selling and Start Connecting  Pat Dix <i>SHAZAM</i>	Effective Uses for Non-Judicial Settlement Agreements  Ellen M. Deeter <i>Dale &amp; Eke, PC</i>

**MEGA FINTECH SHOWCASE • 10:30 - 11:30 AM • ROOM 116-117**

11:45 a.m. - 1:45 p.m. **JAY BAER** Coveted Customer Experience **PLUS, FIVE STAR AND DIAMOND AWARDS**

2:00 p.m. - 3:00 p.m.  
3:30 p.m. - 4:30 p.m.

Fraud Trends: How Fraud Became a Business "Influencer"  Jim Rechel <i>The Rechel Group</i>	Implications of GPT and Other Large Language Models for Banks  Connor Heaton <i>Strategic Resource Management, Inc.</i>	Digital Account Opening Mastery: Strategies for Bank Growth  Eric Cook <i>WSI Digital</i>	Impact of Rising Interest Rates on Credit Risk and Lending  Giulio Camerini, CRC <i>Crowe LLP</i>	Navigating Today's Banking Challenges: A Workshop on Prospecting and Value Differentiation  Jack Kasel <i>Anthony Cole Training Group</i>	Optimizing Team Performance: Metrics for Managing Trust and Wealth Workloads  Michael Dixon <i>Pohl Consulting</i>
Perspectives on the Economy  Jim Bullard <i>Mitchell E. Daniels, Jr. School of Business at Purdue University</i>		AI and the Future of Payments  Pat Dix <i>SHAZAM</i>	Rightsizing Enterprise Risk Management  Rebecca Towne <i>Quadrant Risk Advisory LLC</i>	Negotiating a Win-Win  Joe Micallef <i>Grow UP Sales</i>	The Strategic Advantage of Designating a Trust as Your Qualified Retirement Account Beneficiary  Keith P. Huffman & Kristin L. Steckbeck <i>Dale, Huffman &amp; Babcock</i>

4:30-5:30 p.m. • MEGA CELEBRATION • EXHIBIT HALL

**MAY 8, 2024**  
Find full session descriptions at  
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# WEDNESDAY

## BUSINESS LENDING

## COMPLIANCE

## FINANCIAL MANAGEMENT

## HUMAN RESOURCES

## LEADERSHIP

## MARKETING

WABASH 3

WABASH 1

WABASH 2

ROOM 107-108

ROOM 105-106

ROOM 109-110



Strategic Loan Growth in a Dynamic Rate Environment

Prepare for 1071: Grasp Implications, Navigate Rules & Plan Implementation

Stacking the Deck in Your Favor: Secrets of High-Performing Banks

Where Did All the Workers Go?

Empowering Mid-Level Leadership: Building a Positive and Productive Work Culture

A Guide to Successful Email Marketing for Banks: The Ultimate Do's and Don'ts

Tim Keith  
*Infusion Marketing Group*

Michelle Strickland, CRCM  
*TCA Compliance*

Robb Rempel  
*Haberfeld*

Marilyn Faulkenburg, SHRM-CP, SHRM-SCP  
*MJ Training & Consulting*

Amber Fields  
*trueU*

Allyson Twiggs  
*The Twiggs Group*

What's Wrong with My Lending Culture? Adapting to CFPB 1071 Reporting Requirements

Impact and Responsiveness under the New CRA: How Can Your Institution Be Impactful and Responsive?

Navigating the Financial Horizon: Bank Tax Update

Creating a Culture of Belonging

Stop Looking Like a Novice on LinkedIn: Five Steps to Building a Profile You Can Be Proud of Online

Practical Applications for Generative AI in Your Bank

Rob Newberry  
*Abrigo*

Jason Keller, MPPA  
*Walters Kluwer*

Mike Summers & Bryan Clevenger  
*FORVIS*

MeChelle Callen, SPHR, SHRM  
*Equitable HR Consulting*

Eric Cook  
*WSI Digital*

Derek Baker & Ryan Pleggenkuhle  
*Mills Marketing*

11:45 a.m. - 1:15 p.m. **JOSHUA EVANS Purpose or Perish**

**PLUS, COMMITMENT TO COMMUNITY AWARDS**

1:15 - 1:40 PM **DESSERT & EXHIBITOR DRAWINGS**

Betting the Bank on Borrower Sales Projections: Hedging Your Bet

The Full Circle: Redlining Examples and Risk Mitigation Strategies

Profitability Under Attack: Safeguarding Financial Success through Effective Deposit and Loan Strategies

Unpacking Compensation in a Changing Workforce: Strategies for Success

Quiet Quitting: What You Can Do About It

Transform your Messaging from Mundane to Memorable

Dev Strischek  
*Devon Risk Advisory Group*

Adam Witmer  
*Compliance Cohort*

Rob Newberry  
*Abrigo*

Megan Nail, CCP, SHRM-SCP, CEBS  
*NFP*

Theresa Valade  
*Success Trek, Inc.*

John Crilly  
*BIG*

Enhancing Portfolio Monitoring: A Proactive Approach in Uncertain Economic Times

Reg E Disputes: What Everyone is Talking About

The Economy, White House, Congress, and the Fed: What's Right and What's Wrong?

Does AI Know Why the Chicken Crossed the Road? Managing Risk for Employers in the Age of AI

Diving for Deeper Meaning

Measuring the ROI of Your Bank's Digital Marketing Strategy

Mike Horrocks  
*Baker Hill*

Amy Koshiol & Karen Leiter  
*CLA*

Stephen Happel  
*Arizona State Univ., W.P. Carey School of Business*

Shelley M. Jackson & Chloe N. Craft  
*Krieg DeVault LLP*

Joshua Evans  
*Enthusiastic You! LLC*

Eric Cook  
*WSI Digital*

3:30 p.m. - MEGA CLOSING - HAVE A SAFE TRIP HOME!

9:00 a.m. - 10:00 a.m.

10:30 a.m. - 11:30 a.m.

1:40 p.m. - 2:30 p.m.

2:40 p.m. - 3:30 p.m.