




Agenda

Wednesday October 10th

		<u>Location</u>
07:30 AM – 08:00 AM	Breakfast – Sponsored by IBM	Restaurant R'evolution
07:30 AM – 08:00 AM	Registration	Arcade
08:00 AM – 10:00 AM	Morning Training Sessions (choose from 3 sessions) <i>*See Full Descriptions on next page</i>	
	Session 1 – AaSys – Beth Sumner -- Dual Controls in IS	Royal Conti
	Session 2 – CCB Community Bank – Brenda Steele BPM I-32 Forms Design	Evangeline Suite A & B
	Session 3 – Peak Consulting – Brent Reynolds & Robert Fischer Collateral & LTV – Evaluating your Portfolio Shadow Accounting	Evangeline Suite C
10:00 AM – 10:15 AM	Break - *See sponsor list on page 8	Foyer
10:15 AM – 12:00 PM	Morning Training Sessions (cont.)	
12:00 PM – 01:00 PM	Lunch	Restaurant R'evolution
01:00 PM – 02:30 PM	Afternoon Training Sessions <i>*See Full Descriptions on next page</i>	
	Session 1 – AaSys – Beth Sumner Creative ways to test your BCP	Royal Conti
	Session 2 – CCB Community Bank – Brenda Steel BPM & BPM Administration	Evangeline Suite A & B
	Session 3 – Peak Consulting – Brent Reynolds and Robert Fischer Deposit Charge-Offs, Loan & Deposit Roundtable	Evangeline Suite C
03:00 PM – 03:30 PM	Break - *See sponsor list on page 8	Foyer
03:30 PM – 04:30 PM	Afternoon Training Sessions (cont.)	
04:45 PM – 05:45 PM	MSUG Officers Board Meeting	Evangeline Suite C
06:30 PM – 10:00 PM	Vendor Setup	Evangeline Suite & Foyer
06:30 PM – 10:00 PM	Balcony on Bourbon Street - Hospitality Suite Open *Sponsored by Peak Consulting	
<i>Beverages & Light Hors d' Oeuvres will be served 7-8 PM</i>		

Training Option 1	Training Option 2	Training Option 3
<p>Beth Sumner AaSys Group</p> 	<p>Brenda Steele CCB Community Bank</p> 	<p>Brent Reynolds & Robert Fischer Peak Consulting</p> 
<p>Information Security, BCP</p>	<p>Business Process Manager</p>	<p>Loans, Deposits</p>
<p>Morning – Dual Controls in Information Security GLBA, Appendix J, the Cyberassessment Tool, the Management Booklet, the Information Security Booklet, the Vendor Management Booklet...the list goes on and on. During this interactive session, we'll discuss the role of Information Security within a community bank and how dual controls can be implemented even when you're wearing multiple hats. Attendees will walk away with a checklist of daily, monthly, quarterly and annual information security tasks that can be customized for bank use.</p> <p>Afternoon – Creative Ways to Test Your Business Continuity Plan During this entertaining session, we'll discuss ways to increase engagement within your business continuity testing. Example scenarios will be provided for bank use.</p> <p>Late Afternoon – Information Security Round Table Have you ever wondered what your peers are using for patch management? Or maybe what the best firewall monitoring company is? Now is your chance to ask! Bring your questions and hear what other banks are doing when it comes to Information Security related topics.</p>	<p>Morning -- I32 Forms Design A quick review of creating your bank's custom documents. Attendees will leave with the knowledge of how to set up basic documents with bank logos, default fields and inline data fields. I will share with the group tips that will help to make this process easier.</p> <p>Afternoon --BPM & BPM Administrator Are you using BPM just for opening Deposit Accounts? See how to gain efficiencies throughout your bank with workflows designed to streamline Human Resource processes, Charge Offs, Loan Application, Credit, Title inquiries, Specification Requests, Authorization, Audit and Reviews. If you have a manual internal process, you can automate it with BPM from origination to audit and archive. No longer is BPM just a deposit platform! The class will cover each action, transition, wizard and process to complete various workflows. Sample workflows will be reviewed.</p>	<p>Morning –Collateral & LTV: Evaluating your portfolio How clean is your collateral? Come learn more about the features that can maximize your collateral system to make it work for you. Investing time into your collateral can create a more powerful tool. Utilizing the features, already built into the system, it can show more accurate LTV ratios and be less cluttered.</p> <p>Shadow Loan Accounting – Shadow Loan Accounting is something that many institutions utilize, but few perfect. Attendees to this session will learn best practices for Shadow loan accounting and Book Balance. Peak will share some of the tips and pitfalls they have learned from working with various institutions across the country.</p> <p>Afternoon -- Deposit Charge-Offs How does your institution handle the charge off process for your deposit accounts? We can walk through the steps to bring automation to this process. The system can alleviate the "off-book" tracking of charged off account balances and recoveries and notice generation.</p> <p>Roundtable discussion – For loan and deposit core topics. Including Premier 9.2 and other hot topics.</p>



2018 Annual Conference
Thursday October 11th

Royal Sonesta

		<u>Location</u>
07:00 AM – 07:30 AM	Registration	Arcade
07:00 AM – 08:30 AM	Power Breakfast – Hosted by Burroughs Cybersecurity Issues – 2018 Presenter: Bruce Upton, Stone Bank	South Ballroom South Ballroom
<u>General Session</u>		
08:30 AM – 08:45 AM	Welcome/Opening Comments Tom Coltharp, MSUG President	
08:45 AM – 09:30 AM	Fiserv -- Executive Message - Dave Wegman	
09:30AM – 10:15 AM	Fiserv – A Layered Approach to Fraud and Security Management Presenter: Chad Davison A session focusing on a pan Fiserv strategy for fraud and risk mitigation including: Onboard Advisor, AML and Fraud Risk Manager, Notifi, Guardian Analytics, Verifast: Palm Authentication, SecureNow, Professional Services and other solutions.	
10:15AM – 10:45 AM	Break –*See sponsor list on page 8	Foyer
10:45AM – 11:45AM	Fiserv – Premier Update – Jeff Niedbalski	South Ballroom
11:45 PM – 01:00 PM	Lunch	Restaurant R'evolution
12:30 PM – 4:45 PM	Vendor Room OPEN *Vendor Room will be open during Breakout Sessions	Evangeline Suite & Foyer
1:00PM – 1:50PM		

Location	Thursday Breakout Sessions Topic / Presenter
South Ballroom	Burroughs -- Update on ATM - Customer Self Service - Cash Automation and Maintenance Services –Presenter: Jim Knoth UNISYS – ClearPath update - Software only Delivery (FS1000) - “Tricks” of the Trade. Presenter: Steve Koss
Royal Conti	IBM - IBM POWER9 and FlashSystems: A Reimagined Infrastructure Presenters: Jeff Boleman and Robert Berini See how IBM POWER9 and IBM FlashSystems are innovating for the modern era for your existing needs and beyond. The combination of recently introduced Enterprise Class POWER9 systems and the NVMe based IBM FlashSystem 9100 are just two examples of how IBM Systems can propel you into the future with new and constantly increasing workloads for core financial systems, analytics and AI.
Bourbon	Fiserv –The Future of Electronic Payments Presenter: Katie MCGhee, Digital Banking Group We will discuss Person to Person and Account to Account offerings. Understanding what and how each solution is different, is key to managing client expectations and needs. P2P- Zelle and Popmoney A2A- TransferNow All attendees present eligible to win an Echo Show. Winner will be drawn at the conclusion of the session.
Bacchus	Fiserv –Leveraging Billing and Payment Customer Research to Improve Customer Satisfaction Presenter: Chris Reagin, Biller Solutions Billing and payments are the most common touchpoint you have with your customers. With the unprecedented dependency we have on our mobile devices the expectations for payment flexibility has changed. Join us to gain insight from the latest consumer billing and payment research and learn how you can use this common touch point to increase customer satisfaction. All attendees present eligible to win an Echo Show. Winner will be drawn at the conclusion of the session.
Choctaw	Fiserv -- Outsourcing with Fiserv The FI Technology Industry – How does Fiserv compare? In-House to Outsource – Why have so many made the move

2:00PM – 3:00PM

Location	Thursday Breakout Sessions Topic / Presenter
South Ballroom	Fiserv – Engage Presenter: Jeff Niedbalski
Royal Conti	Fiserv – Director Update Presenter: Mike Jucht
Bourbon	Fiserv – Originate – Online Account Opening Presenter: Brandon Trease
Bacchus	Fiserv – Business Online 6.0 Update with ACH Manager and Wire Manager Presenter: Justin Everitt
Choctaw	Fiserv – Market Performance Solutions Presenter: Sam Venhaus
Gris Gris	Fiserv – Business Analytics with Performance Data Warehouse Presenter: Colby Enevoldsen

3:00PM – 3:40PM

Break – *See sponsor list on page 8

Foyer

3:45PM – 4:45PM

Location	Thursday Breakout Sessions Topic / Presenter
South Ballroom	Fiserv – Business Analytics with Performance Data Warehouse Presenter: Colby Enevoldsen
Royal Conti	Fiserv - Director Update Presenter: Mike Jucht
Bourbon	RHA – Name/Address Merging, Purging Accounts & Name/Address Records Presenters: Rick Hebert, Jeff McGinnis and Denise Butler 1) Overview of duplicate Name and Address Merging 2) Optimal steps for Purging Closed Accounts and unused Name & Address Records
Bacchus	Acumen Technology – GDPR Compliance: Backup and DR Presenter: James Farley What is GDPR and How a Properly Designed Data Backup and Disaster Recovery Solution and Facilitate GDPR Compliance
Choctaw	BeaverCreek – -Branch and online engagement: preparing your staff for success Presenters: Rachael and Adam Ocallaghan We will cover how to equip your staff with the knowledge and tools for making the most out of face-to-face and online interactions with your customers. Topics include: • Social media engagement workflows • The importance of non promotional content for online and in-the branch • Branch of the future solutions for one-to-one personal product demonstrations • Staff training - building confidence in your front-line, to be champions of your services and brand
Gris Gris	Fiserv - Retail Online Update with Credit Sense Presenter: Brandon Trease

4:45PM – 5:30PM

Round Table Discussions / Questions

South Ballroom

6:30PM – 10:00PM

Balcony on Bourbon Street - Hospitality Suite Open

*See sponsor list on page 8

Beverages & Light Hors d' Oeuvres will be served 7-8 PM



Friday, October 12th

Location

07:00 AM – 08:30 AM	Power Breakfast – Hosted by BankInfra Technology Bank Automation of Regulation CC, SSA e4641, eProcurement & Risk Management Presenter: Daniel Kim	South Ballroom
08:30 AM – 08:45 AM	Opening Session – Tom Coltharp, MSUG President	South Ballroom
8:50AM – 9:50AM	Breakout Sessions	

Location	Friday Breakout Sessions Title / Presenter
South Ballroom	Peak Consulting – Presenter: Brent Reynolds and Robert Fischer Adding measurable benefit using independent consulting, with Q&A
Royal Conti	SMA Solutions – Presenter: Josh Higgins Empower Your Employees Through the Power of Automation
Bourbon	Fiserv Output Solutions - Why Instant Issue Matters: Revenue, Relevance, Responsiveness Presenter: Amber Davies Financial institutions are looking at new models of card issuance and reimagining the branch experience in order to satisfy consumer expectations. Learn how Instant Issue Advantage™ can help you maximize your card programs, improve customer engagement and gain a competitive advantage. Fiserv Output Solutions – Statement Advantage™ Expands for Loan and Account Analysis Statements Presenter: Jeff Luna Over 850 financial institutions have selected Statement Advantage from Fiserv to achieve seamless accountholder experiences across all channels — digital, print or both. Now is the time to get onboard. Join this session to hear about the expanded document types, including Loan and Account Analysis Statements and other top advancements for improving accountholder experience, continuity and brand integrity. Your accountholders expect consistent, satisfying experiences no matter how they engage with you. Meet and leverage those expectations without investing dollars and resources by delivering highly engaged communications with Statement Advantage. <i>During the session all attendees present will be entered into a drawing for an Echo Show. Winner will be drawn at the conclusion of the session.</i>
Bacchus	Fiserv - Business Online 6.0 Update with ACH Manager and Wire Manager Presenter: Justin Everitt
Choctaw	Fiserv - Market Performance Solutions Presenter: Sam Venhaus
Gris Gris	Fiserv - Originate – Online Account Opening Presenter: Brandon Trease



Friday, October 12th

10:00AM – 10:30AM Breakout Sessions

Location	Friday Breakout Sessions Title / Presentation
South Ballroom	360 View – Come learn how to bridge the gap between your front-line sales and service to your back office operations. Presenter: Keith Twisdale
Royal Conti	Quest Analytics -- IQService, integrated with Navigator and Access Manager, to deliver <i>Service on Steroids!</i> Presenter: Kraig Nellis
Bourbon	UniLink – Fulfillment Solutions for the Branch of the Future Presenter: Enzo Gugliotta
Bacchus	FNBB – NetLink Enhancement – User Setup and Security Presenter: Cheryl Kennedy and Kimber Gill
Choctaw	Safe Systems – Vendor Management Do They or Don't They?, Will They or Won't They?, and Can We or Can't We? Presenter: Tom Hinkel
Gris Gris	Genesys Technology Group Presenter: David Noël MBA CFSA CRCM, EVP Support Services

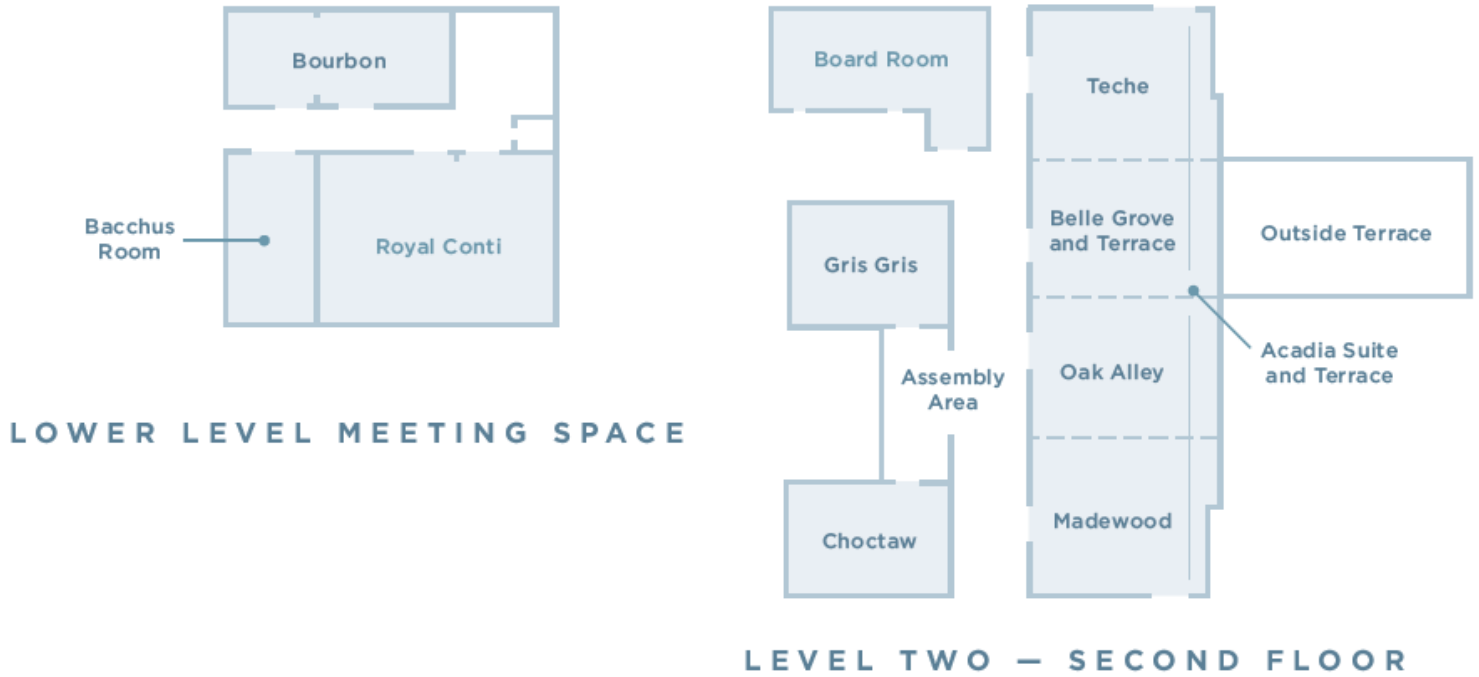
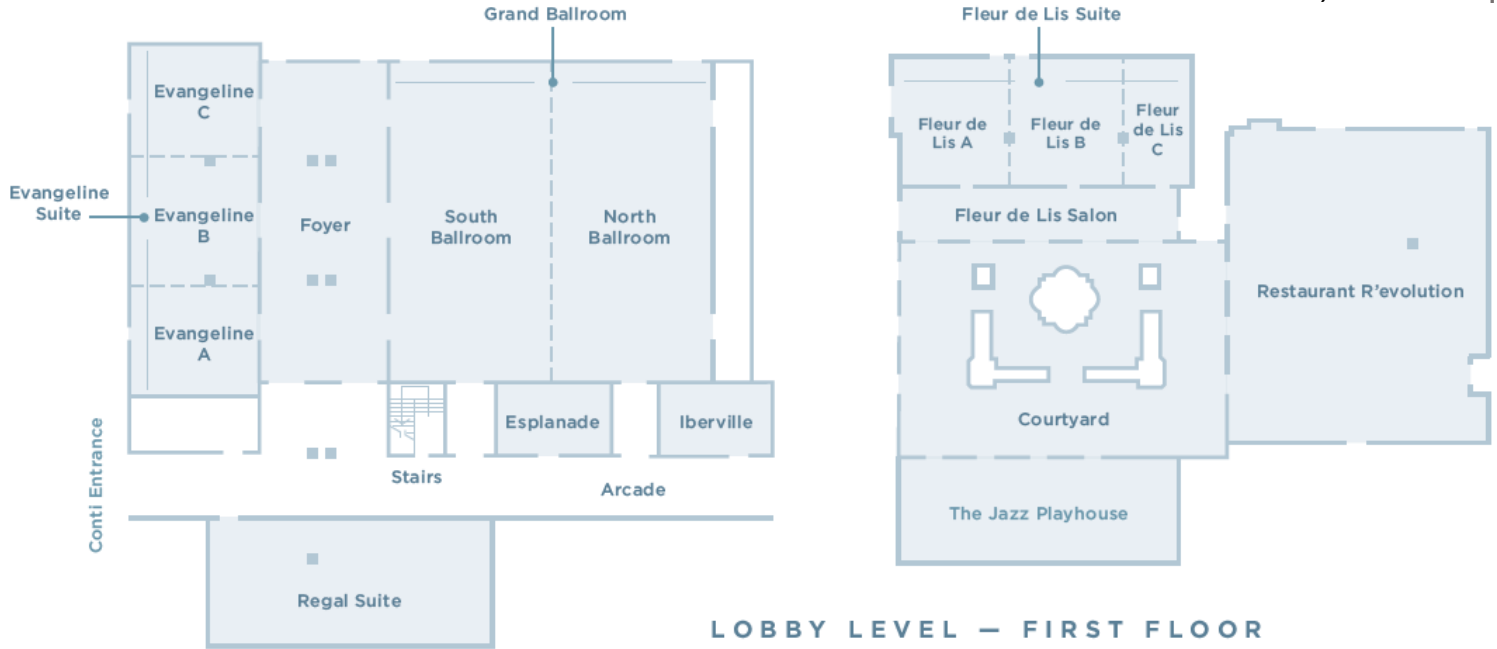
10:30AM – 11:00 AM Break –*See sponsor list on page 8 Foyer

Vendor Room OPEN – Last opportunity to get Walk around Cards completed and visit with vendors

11:15 AM – 11:30 AM Vendor Drawings – South Ballroom
MUST BE PRESENT TO WIN

11:30 AM – Vendors may start breakdown – Thank you for attending our Conference!!

11:30 PM – 12:00 PM General Session - Business Meeting South Ballroom
Drawings – Adjourn





Please give a Big – “Thank You” to these Vendors when you visit with them

Break Sponsors

Silver Sponsors	Bronze Sponsors
<p>Acumen Technologies</p> <p>Beavercreek Marketing</p> <p>Fiserv – Output Solutions</p> <p>Peak Consulting</p> <p>RHA</p> <p>SMA Solutions</p>	<p>360 View</p> <p>Fiserv – Biller Solutions</p> <p>Fiserv – Digital Banking Group</p> <p>FNBB</p> <p>Genesys Technology</p> <p>Quest Analytics</p> <p>Safe Systems</p> <p>UniLink</p>

Breakfast Sponsors

Wednesday	IBM
Thursday	Burroughs
Friday	BankInfra Technology Inc

Hospitality Suite Sponsors

Hospitality Room / Balcony	Fiserv																								
Food & Drinks Wednesday	Peak Consulting																								
Food & Drinks Thursday	<table> <tbody> <tr> <td>360 View</td> <td>Genesys Technology Group</td> </tr> <tr> <td>Acumen Technology</td> <td>IBM</td> </tr> <tr> <td>AaSys Group</td> <td>Nfina Technologies</td> </tr> <tr> <td>BankInfra Technology Inc</td> <td>Peak Consulting</td> </tr> <tr> <td>BeaverCreek Marketing</td> <td>PrintMail</td> </tr> <tr> <td>Benchmark Technology Group</td> <td>Quest Analytics</td> </tr> <tr> <td>CC Interactive LLC</td> <td>RHA</td> </tr> <tr> <td>DataComm</td> <td>RLR Management Consulting</td> </tr> <tr> <td>Fiserv Biller Solutions</td> <td>Safe Systems</td> </tr> <tr> <td>Fiserv Digital Banking Group</td> <td>SMA Solutions</td> </tr> <tr> <td>Fiserv Output Solutions</td> <td>UniLink</td> </tr> <tr> <td>FNBB</td> <td>vIntegrators Inc</td> </tr> </tbody> </table>	360 View	Genesys Technology Group	Acumen Technology	IBM	AaSys Group	Nfina Technologies	BankInfra Technology Inc	Peak Consulting	BeaverCreek Marketing	PrintMail	Benchmark Technology Group	Quest Analytics	CC Interactive LLC	RHA	DataComm	RLR Management Consulting	Fiserv Biller Solutions	Safe Systems	Fiserv Digital Banking Group	SMA Solutions	Fiserv Output Solutions	UniLink	FNBB	vIntegrators Inc
360 View	Genesys Technology Group																								
Acumen Technology	IBM																								
AaSys Group	Nfina Technologies																								
BankInfra Technology Inc	Peak Consulting																								
BeaverCreek Marketing	PrintMail																								
Benchmark Technology Group	Quest Analytics																								
CC Interactive LLC	RHA																								
DataComm	RLR Management Consulting																								
Fiserv Biller Solutions	Safe Systems																								
Fiserv Digital Banking Group	SMA Solutions																								
Fiserv Output Solutions	UniLink																								
FNBB	vIntegrators Inc																								