



Association for Financial Technology
Spring Meeting



March 18-20, 2012
Hyatt Regency Resort & Spa at Gainey Ranch
Scottsdale, Arizona



Program Agenda

Sunday, March 18, 2012

- 8:00-11:00 Board of Directors Meeting
- 11:00-4:00 'Desert Scramble' Golf Outing – Talking Stick Golf Course – See info on page 3
- 5:00- 7:30 Registration Open
- 6:15-6:30 First Timers Toast - *By Invitation Only*
- 6:30-8:00 Welcome Reception

Monday, March 19, 2012

- 7:00- 3:00 Registration Open
- 7:30-8:30 First Time Attendees Orientation Breakfast - *By Invitation Only*
Sponsored by Jack Henry & Associates, Inc.
- 7:30-8:30 Buffet Breakfast
- 8:30-8:45 Welcome and Opening Remarks – Kevin Tweddle, AFT President

- 8:45-10:00 **Keynote Address**
'The Breakthrough Company: How Everyday Companies Become Extraordinary Performers'
Keith McFarland.



Author of #1 The Wall Street Journal and New York Times Best Seller- *The Breakthrough Company: How Everyday Companies Become Extraordinary Performers*, and *Bounce: The Art of Turning Tough Times into Triumph*. As a technology CEO, business school dean, consultant and writer, Keith McFarland has provided management insight to organizations for more than twenty years. He writes a monthly online column for Businessweek, and is founder of McFarland Strategy Partners.

- 10:00-10:30 Refreshment Break – *Sponsored by Malauzai Software**
- 10:30-11:30 *'Leading by Example'*, Frank Martire, President and Chief Executive Officer, FIS



Being a leader is no easy task – someone is always following your every move. Take advantage of the opportunity to lead by example and set the bar high for those who desire to walk in your footsteps. Throughout the course of my career, I have been fortunate to follow some amazing leaders – ones who helped me learn significant lessons along the way. Today, as the leader of a Fortune 500 company, I never forget the advice, knowledge and know-how once shared with me that I hope will inspire others to become great leaders.

- 11:30-1:00 Luncheon
- 1:00-2:00 *'Leaders Ought to Know'*, Phillip Van Hooser, *Van Hooser Associates, Inc.*



Are you adequately prepared for leadership succession in your organization? The presentation offers a leadership development initiative built on comprehensive content, systematic delivery, consistent reinforcement and compelling participant

engagement and interaction. This program provides information that "Leaders Ought to Know".

- 2:00-2:30 Refreshment Break – *Sponsored by Web Equity Solutions**

- 2:30-3:30 *'Revenue & Compliance Innovation for 2012'*, Paul Reymann, Chief Risk Officer at HEIT, a CSI Company, covers Regulatory Transformation; Why Traditional Compliance and Revenue Strategies are Failing; Alternative Revenue and Compliance Strategies; FFIEC Authentication Guideline "Sleeper Details"; and Surprising Results from Industry Authentication Survey



- 3:30-4:00 Refreshment Break
- 4:00-5:00 Panel Discussion - *'Creating Winning Partnerships'*
Moderators: Steve Hufford, Managing Director for Raymond James & Associates
Panelists: Bob Ezell, VP Product Market, Computer Services, Inc.; Brian O'Neil, VP Partner Management, FIS; Adam Coyle, President of Vantiv's subsidiary NPC and Shawn Ward, Co-Founder and CEO, Geezee.
- 5:00 Meeting adjourned for the day
- 6:00-9:00 Special Event – *'Half-Way to Hawaii' Luau* – *Sponsored by FIS**

Join in the fun, great food and entertainment this evening as we gather outdoors in the beautiful, lush, tropical Palm Grove area for an exciting Luau. We will feast on succulent, spit-roasted pig and other traditional Polynesian fare accompanied by Big Island theme music and décor. Casual dress with the emphasis on Hawaiian is the proper attire. We'll furnish the leis and Mai Tais. You bring the flip flops! Who knows, we may even have a spontaneous hula contest! Don't miss this exciting event.

Tuesday, March 20, 2012

- 7:00-3:30 Registration Open
- 7:30-8:30 Buffet Breakfast
- 8:30-9:30 CEO Keynote: *'The Mobile Payments Game Changer'*, Paul Fiore
Consumer payment at a retail merchant was traditionally a simple experience; swipe, receive a yes or no, and maybe sign your name. The complexity of authorization, settlement and dispute resolution was behind the scenes and left to financial services companies. On the retail side, advances in marketing tools and tactics could only be implemented as fast as point-of-sale systems and traditional analog media channels would allow. Mobile device ubiquity is a game changer for participants in the payment network, as well as merchants and their partners. Mr. Fiore will share his views of current and potential future uses of mobile devices and software on both sides of the transaction that can change the game.



Paul Fiore was co-founder and CEO of online banking software provider Digital Insight (company was founded in 1995, went public in 1999 and sold to Intuit for over \$1.3 billion in 2007). Fiore was also CFO for AT&T Employees Federal Credit Union for 5 years; VP Strategy for core financial institution software

vendor XP Systems, President of a loyalty rewards company for two years, a General Manager of leading prepaid debit card company Green Dot, and adviser and investor of several entrepreneurial ventures, including TabbedOut and DoubleBeam. Paul graduated from New York University with a B.S. degree in Finance and Management.

9:30- 10:00 Refreshment Break –
*Sponsored by Fifth Third Bank**

10:00-11:30 Interactive Session – Moderators:
Dave Foss, President, ProfitStars;
Zach Duke, VP Business Development,
Safe Systems, Inc.

11:30-1:00 Luncheon

1:00-2:15 *'Use the Right Sales Compensation Plan to Drive Exceptional Results'*, David Cichelli
What makes a great sales compensation program? Why do many sales departments change their sales compensation plans on an annual basis? What is the best means to motivate sales personnel to reward company sales objectives? Learn the answer to these and other questions during this session on effective sales compensation solutions. Your phase of growth will provide the right direction for selecting winning sales compensation plans. Improve your annual review process. Correctly redesign your sales compensation plans to produce the right sales results to achieve and exceed company objectives.



2:15-2:45 Refreshment Break

2:45-3:45 *'Sales Compensation Illustrations and Solutions'*, David Cichelli
In this interactive session, explore the use of various types of sales compensation formula to motivate and reward sales performance. Learn how to calculate commission plans, develop bonus payout schedules and use advance techniques such as hurdles, modifiers and matrices. Bring your questions and examples for discussion purposes. Test your ideas with your peers. Improve the performance of your sales compensation plans.



3:45- 4:00 Refreshment Break

4:00-5:00 *'The Art of FLOW'- The Key to High Performance*, Adam Fraser
Let's face it , life is getting faster and faster and shows no signs of slowing down. Business is more competitive now than any other time in history! Companies and individuals need to out create, out innovate and out market their competition. The result of this is a workforce that is having serious issues around sustaining their performance. The fall out is that people are losing the ability to focus, be creative and develop clear strategies.



Dr. Adam Fraser is one of Australia's leading educators, researchers and thought leaders in the area of human performance. Adam is a regular in the media and has been featured in the Australian Financial Review and Business Review Weekly. He is also a regular presenter on Sunrise and the Today Show.

Combining years of work with the elite level athletes, the armed

forces and business professionals of all levels, Dr. Adam Frasier has perfected the art of Flow. This philosophy is a real time solution to stress and burn out that doesn't involve having to take time out or adding another task to your already full to do list! Flow is a high performance state also known as being "In the Zone". At the heart of flow we find the key to getting more done for a longer period of time, whilst reducing stress levels, preventing burnout and keeping our teams engaged. Flow is not a band aid solution but provides a vehicle to enable recovery from poor working habits.

5:00 Meeting Adjourned

6:00 -7:30 Farewell Reception –
*Sponsored by Integra Business Systems, Inc.**

Join us in the inviting Palm Grove area for a fun and casual farewell to Scottsdale. Enjoy plentiful and tasty Southwestern style food and drink as we say goodbye to friends until next time. Blue jeans and an appetite are all you'll need for this last round-up.

*Thanks to all of our Sponsors whose generous financial support allows us to continue improving the quality of our conferences

Everyone have a safe trip home!
See you at our 2012 Annual Meeting,

September 16-18, 2012,
The Grove Park Inn, Asheville, North Carolina



Golf Outing — A Desert Scramble

Join fellow AFT conference attendees for an afternoon of good fun and camaraderie on the links at nearby Talking Stick Golf Course. Our 4-person scramble format allows everyone of any skill level to contribute in a team event where the emphasis is more on fun than winning. Yet, to add to the competition, individual trophies await members of the winning foursome.

Owned by the Salt River Pima-Maricopa Indian Community, the Bill Coore and Ben Crenshaw designed North Course is a links style adventure running through grasslands with ingenious bunkering with spectacular vistas of the McDowell Mountains as the backdrop.

Your \$195 entry fee includes green fee, cart rental, practice range balls, bag tag, box lunch, on-course refreshments and roundtrip transportation for the very short trip from the Hyatt Regency Scottsdale at Gainey Ranch.



Premium, up-to-date, Callaway rental clubs are \$60+tax per set (not included) and must be ordered in advance through Erin Thomas at the AFT Executive Office to guarantee availability. Please specify men's or ladies right or left handed when ordering.



Hotel Information

Our meeting headquarters is the 5-Star, Hyatt Regency Scottsdale Resort & Spa at Gainey Ranch. This popular resort is tastefully set amidst flowering cactus, breathtaking sunsets and framed against the majestic McDowell Mountains. The secluded setting combines the beauty of the Sonoran Desert with all the activities and amenities of a luxury resort. The resort features 493 spacious guest rooms, suites and casitas all with private balconies overlooking the scenic Arizona desert and mountains. Recreational amenities include a 2 ½ acre water oasis with ten pools, sand beach with a three story waterslide, 27 holes of championship golf, Spa Avania, tennis, jogging and cycling trails. The special AFT group rate at the Hyatt Regency is \$259 double or king room, single or double occupancy. Just use this link to reserve your room.

<https://resweb.passkey.com/go/AFT2012> . If you would like to call directly, the number is (888) 421-1442. The reservation cut-off date is February 16, 2012. After February 16, reservations will be accepted on a space and rate availability basis only. Don't miss staying at our Official Headquarters Hotel. Make your room reservation today.

Transportation to Resort from Phoenix Sky Harbor International Airport

Taxi service is available at Terminal 2, north curbside; Terminal 3, north curbside; and Terminal 4, Level 1, north curbside. The cost for the taxi service is approximately \$40 one way and is available 24 hours.

Super Shuttle vans depart every 15 minutes from 9:00 a.m. -9:00 p.m. Super Shuttle stops are located at Terminal 2, north curbside; Terminal 3, north and south curbside; and Terminal 4, Level 1, north and south curbside. The cost is \$20 one way. Call (602) 244-9000 for more information.

If you are driving or renting a car, the hotel provides free self-parking. The cost for valet parking is \$27 per day.

Spa Avania

Against the vibrant hues of the Sonoran Desert comes the first Arizona spa where every detail has been seamlessly choreographed to the science of time. A uniquely holistic approach that bases your total-immersion experience on the inescapably cyclical needs of your body at key periods of the day. It has blended personalized treatment offer-

ings, mineral water therapy, uniquely synchronized music, yoga, diet and the antioxidant blessings of the world's finest teas into an artful indoor-outdoor oasis. AFT Spring Meeting attendees and guests will be able to take advantage of a special **20% discount** on Monday, March 19, 2012 by calling the spa directly. To schedule your appointment call 480-483-5558 or dial extension 70 when you arrive on property and request the special AFT discount.



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helped us present
an outstanding 2012 Spring
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Bronze Level — \$1,000.00



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