



Inspiration Starts Here

The *only* summit
for helping fintech
companies succeed.

AFT Spring Summit
March 4-6, 2018
Ojai Valley Inn
Ojai, CA

AFT | ASSOCIATION FOR
FINANCIAL
TECHNOLOGY



AFT's Spring Summit – Inspiration Starts Here!
Are you ready to recharge and reframe your perspective? Then join us for the industry's premier event for financial technology firms and their leaders. This year's Spring Summit will challenge your perceptions by providing networking opportunities and fresh content for fintech leaders. We're bringing together movers and shakers, C-level execs, and other senior-level attendees to learn more about this industry and how trends in the marketplace may affect your business. AFT Spring Summit is your chance to learn how other companies are leading through innovation and leadership development – and ultimately defining the banking experience of the future. Get Inspired!

SUNDAY, MARCH 4, 2018 – SUNDAY FUNDAY

8:00 AM - 11:30 AM Board of Directors Meeting

11:00 AM - 5:00 PM Registration Open

12:00 PM - 5:00 PM AFT Golf Outing

Join fellow AFT members, new prospects, and spouses/guests for a fun-filled afternoon of friendly golf at Ojai Country Club. The world-class Ojai Country Club was one of the first great golf courses in Southern California. Designed and originally built in 1923 under the direction of George C. Thomas, Jr. and Billy Bell, the course was hailed as "a marvel of golfing architecture." Thomas, who also designed courses at the Riviera, Bel-Air and Los Angeles Country Clubs, had two initial considerations for the Ojai course: "...that the average golfer could enjoy his round without too great a penalty, and that a test must be afforded requiring the low-handicap man to play fine golf in order to secure pars."

Open to golfers of all skill levels and played in a "Scramble" format which affords opportunities for all team members to contribute and challenge for prizes. Rental clubs are readily available at optional extra cost of \$75. The tournament is limited to the first 40 golfers signing up. Don't miss this always popular event. Register TODAY! \$199 – includes greens fee, cart and box lunch.

12:00 PM - 5:00 PM Ronald Reagan Library and Lunch Under Air Force One

In a storied career that spanned more than five decades, Ronald Reagan inspired Americans to act and achieve even more than they imagined. His legacy thrives at The Reagan Library where events and exhibits rediscover his values, actions and spirit of determination. Perched atop a hill with sweeping views of the southland, the Reagan Library is one of California's most beautiful and unique destinations. This special event will include a docent-led tour of the Ronald Reagan Presidential Library and the amazing Air Force One Pavilion, and spectacular special exhibits, followed by a unique and delightful lunch. Register TODAY! \$149.

6:30 PM - 7:00 PM VIP Toast – Friendship Tree Lawn

Join the AFT Board of Directors and Ambassadors for the perfect kick-off to your first AFT Summit!

7:00 PM - 8:30 PM Welcome Reception – Friendship Tree Lawn



MONDAY MARCH 5, 2018

7:00 AM - 3:00 PM Registration Open

7:30 AM - 8:30 AM First Time Attendees Orientation Breakfast

If it is your first time attending the AFT Summit, make sure to join us for a breakfast with the Board of Directors. The breakfast will include a look at the history of the association and what to expect during your first summit.

7:30 AM - 8:30 AM Breakfast

8:30 AM - 9:00 AM Welcome and Opening Remarks

AFT President, **Zach Duke**, EVP Business Development, Safe Systems

9:00 AM - 10:00 AM **Mark Kelly, Keynote Speaker**

On January 8, 2011, Captain Mark Kelly would face the toughest challenge of his life when an assassination attempt was made on his wife, former Congresswoman Gabrielle Giffords. His dedication to family and Giffords' road to recovery captivated the nation. For Mark Kelly, focus equals success – even in the face of adversity. Personifying the best of the American spirit, Kelly is a hometown hero who was a combat pilot in Iraq, an astronaut on four Space Shuttle missions, and commander of the final flight of Space Shuttle Endeavour. He has combined teamwork, leadership, communication, and family in an unwavering commitment to succeed. Kelly shows audiences how to accomplish their mission while maintaining the love and devotion to family that is the foundation of true success.

10:00 AM - 10:30 AM Networking Break

10:00 AM - 3:00 PM Spouse Event – Shopping Shuttle to Santa Barbra

Historic State Street Plaza in Downtown Santa Barbara is one of America's most pedestrian-friendly downtowns, in large part due to the amazing diversity of shopping choices. These shop-lined streets are a favorite with visitors and locals alike. From Santa Barbara-style specialty shops to national brands, and from regional gallery favorites to indie boutiques, Downtown Santa Barbara offers an authentic shopping experience, whether you are seriously shopping, strolling, or just taking in the scene.

10:30 AM - 11:30 AM From FinTechs to BigTechs: What Shifts in Threats Mean for the Future of Financial Services, **Lee Wetherington, Jack Henry & Associates, Inc.**

Lee Wetherington, AAP, is Director of Strategic Insight for Jack Henry & Associates, Inc. Lee directs the development of actionable insight and strategy for the financial services industry at large. To this end, he creates programs, presentations, and articles designed to orient and educate financial executives on the trends and implications of new technologies. He routinely delivers keynotes nationwide focusing upon opportunities and challenges in fintech, payments, and the online/mobile/social channels, and he is widely known for his unique style of comedic delivery.

11:30 AM - 1:00 PM Lunch and Interactive Discussion Tables

1:00 PM - 2:30 PM Government Relations Update, **Kurt Helwig, CEO of EFTA and**

Kim Ford, VP of Public Affairs for First Data

An analysis of the legislative and regulatory environment in Washington and the likelihood of financial services related legislation and regulation in an election year.

2:30 PM - 3:00 PM Networking Break

3:00 PM - 4:00 PM The Economy Analysis -

Lindsey Piegza, Chief Economist for Stifel Fixed Income

Chief Economist Lindsey Piegza will look at the pace of our economic recovery and what it means going forward for overall growth, interest rates and monetary policy. Often quoted in the business press, Piegza is a regular guest on CNBC, Fox News, CNN and Bloomberg, as well as national radio and other business news outlets.

4:15 PM - 5:15 PM Digital Banking SIG

Newly formed and launching at AFT Spring 2018, the Digital Banking SIG is a community of AFT members coming together to discuss relevant issues regarding the Digital Banking market today. Formed in the spirit with which AFT operates today, the group's purpose is to provide an opportunity for free interchange of information and ideas; to provide for collective action that is more effective when acting as a group; and, to foster ethical and professional business practices.

6:00 PM - 9:00 PM Special Event – Topa Winery

Topa Mountain Winery is situated under the watchful eye of the Topa Topa Mountain range in the Upper Ojai Valley, surrounded by ancient oaks and majestic redwoods.



TUESDAY, MARCH 6, 2018

8:00 AM - 3:30 PM Registration Open

8:00 AM - 9:00 AM Breakfast

9:00 AM - 10:00 AM CEO Keynote – **Tom Shen**, Chairman and CEO, Malauzai Software

Tom serves as Chief Executive Officer, Chairman of the Board, and is the principal company investor. Tom has over 30 years of experience in the financial services technology industry, having founded Software Dynamics, Inc. (SDI) that was sold to S1 Corporation, and serving as Executive Vice President at Digital Insight. Tom is a respected industry leader and has overseen products, engineering, operations, and helped launch an array of industry-changing online services.

10:00 AM - 10:30 AM Networking Break

10:30 AM - 11:30 PM The Data Driven Era of Financial Services:
A Panel Discussion on AI, Analytics and Machine Learning

Panelists: **John Schulte**, CIO, Mercantile Bank of Michigan • • • • •
Ryan Caldwell, Founder and CEO, MX

• • • • • **Robert Fannon**, Director, Financial Services Industry Team, Microsoft

Moderator: **Jon Nordheusen**, VP Product Strategy, Fiserv

With innovations augmenting in every sector, there comes an imperative need for banking and commerce to reinvent the customer experiences in the financial services. Artificial intelligence (AI) in this regard, plays a crucial role, where banks and credit unions could extend the creative problem solving capabilities and productivity of human workforce and deliver superior business results. Our panel will discuss these topics and provide different perspectives from a banker, a fintech service provider, and one of the largest software companies in the world.

11:30 PM - 1:00 PM Lunch and Work Break

1:00 PM - 2:00 PM CyberSecurity Panel Discussion

Panelists: **Rob Johnston**, Deputy Chief Risk Officer, FIS,
John Carlson, Chief of Staff, FS-ISAC
Paul Hugenburg III, Founder, InfoGPS,
Sebastian Fazziano, Director of Sales, Gladiator, ProfitStars

Moderator: **Mike Alles**, VP, FIS

The panel will discuss various topics in the world of CyberSecurity and will share practical advice on data breach preparedness planning, data breach notification, and legal and operational issues relating to the governance of information across organizations.

2:00 PM - 2:30 PM Networking Break

2:30 PM - 4:00 PM Interactive #1 General Session

Don't miss what most members feel is the most valuable session of the summit. The ever popular interactive allows for open discussions on common problems that leaders in the industry are facing.

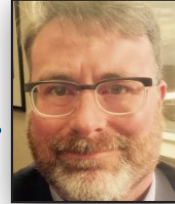
2:30 PM - 4:00 PM Interactive #2 Business Development Session

A throwback to AFT Summits of the past, this interactive breakout will allow business development focused leaders to openly discuss common problems with an area of focus in business development, marketing and sales.

4:00 PM - 5:30 PM Afternoon Business Break

5:30 PM - 6:30 PM Farewell Reception – Orchard Pergola

7:00 PM Dinner on your own





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HOTEL INFORMATION

Nestled in the bohemian enclave of Ojai, California is the historic AAA Five Diamond, Ojai Valley Inn, a luxurious retreat that has been one of California's most revered destinations since opening in 1923. Located just 90 minutes north of Los Angeles, the resort overlooks the unspoiled natural beauty of its mountain surroundings and celebrates the relaxed glamour of California's past to create an unparalleled resort experience that is quintessentially Ojai. The AFT special sleeping room rates is \$285, plus tax. This rate is available to the group based on availability. The special sleeping room rate cutoff is February 15, 2018 or when the room block sells out, whichever comes first. The December fires in the Ojai Valley and Ventura County area did not affect the hotel property – as of January 11, Ojai Valley Inn and Spa is up and running and ready to welcome all guests on property.

Hotel Address

Ojai Valley Inn & Spa
905 Country Club Road
Ojai, CA 93023

To make your sleeping room reservation, please call Ojai Valley Inn & Spa directly at 1.888.697.9116. Tell them you are with the "Association for Financial Technology" group.

Summit Registration

To register for the Spring Summit, please visit
www.aftweb.com/aws/AFT/pt/sp/summit_register

Event Dress

Business Casual

