

**ASSOCIATION for
FINANCIAL TECHNOLOGY
SPRING CONFERENCE**

March 16-18, 2014
Hyatt Regency Hill Country Resort & Spa
San Antonio, TX

Sunday, March 16, 2014

- 8:00-11:00** **Board of Directors Meeting**
- 12:00-4:30** **AFT Golf Outing**
Hyatt Hill Country Golf Club
Sponsored by Dynamic Solutions International and WebEquity Solutions
See sidebar on right page for more details
- 1:00-4:00** **AFT Sand Volleyball Tournament**
Hyatt Regency Hill Country
See sidebar on right page for more details
- 5:30- 7:30** **Registration Open**
- 6:30-8:00** **Welcome Reception**
This popular mixer combines cocktails and plentiful hors d'oeuvres with non-stop conversation and camaraderie. A great place to greet old friends and make new ones.

Monday, March 17, 2014

- 7:00-3:00** **Registration Open**
- 7:30-8:30** **First Time Attendees Orientation Breakfast**
By Invitation Only
- 7:30-8:30** **Buffet Breakfast**
- 8:30-8:45** **Welcome and Opening Remarks**
David Culbertson, AFT President
- 8:45-10:00** **Keynote Address**
The Art of Networking and Business Influence
Mark Jeffries, Leader in the Field of Strategic Communication and Soft Skills.
-  Mark Jeffries has become a trusted advisor and communications consultant to some of the world's largest and most successful corporations, agencies, accounting and law firms. He also regularly appears as an image and communications expert on network television news, finance and lifestyle programs. **(Spouse Guests Invited)**
- 10:00-10:30** **Refreshment Break**
Sponsored by Burroughs, Inc.
- 10:00-11:00** **Spouse Meet & Greet**
This gathering will provide the perfect setting for all our special guests to become better acquainted and learn about the many sightseeing, shopping, dining and other activities available at the Hyatt Regency Hill Country and in the surrounding area during your stay. A light breakfast will be served.
- 10:30-11:45** **Panel – Buying and selling companies; lessons learned**
Panelists: Dana Bowers, founder and Board Member of Digital Compliance, Chris Bledsoe, Advisor to iLumen, Paul Fiore, founder and CEO of CU Wallet, Moderators: Scott Mills, President of William Mills Agency and Kevin Tweddle, President of Bank Intelligence Solutions at Fiserv.
- Ownership changes of fintech companies are a way of life and often the end-game of company founders. Changes in ownership can also lead to fast growth and big expectations. This session will feature executives who have taken on outside investors, bought and sold companies, and lived to tell about what they have learned, what they wished they'd done differently and provide advice to other AFT members who might be in similar situations some day.
- 11:45-1:00** **Luncheon and Work Break**
Sponsored by Jack Henry & Associates

- 1:00-2:00** **The Good (not so good really), Bad and Ugly of Regulatory Priorities from Washington**
Speaker Paul Reymann, Chief Risk Officer, CSI Regulatory Compliance Division & Co-author of the GLBA Data Security Rule.



- 2:00-2:30** **Refreshment Break**

- 2:30-3:30** **CEO Keynote**
The Digital Shift
Mike Kelly, President and CEO PSCU.



Once upon a time, brick and mortar ruled. And in that land of long ago, the more branches the better because proximity was the number one reason people chose a financial institution. But, alas, those simple days are no more.


Now, in this new age of technology, the ability to access and transact digitally is gaining importance. Today's consumers expect everything to be enabled with mobile.

Join Mike Kelly in this session to explore the promise and challenges that mobile technologies are presenting in this brave new world. And how disruption leads to opportunity.

- 3:30-6:00** **Afternoon Business Break**

- 6:00-9:00** **Special Event – A True Texas Barbecue, Mini-Rodeo, Shootout and Dance**
*Sponsored by FIS**
See back page for more details

Tuesday, March 18, 2014

- 7:00-3:30** **Registration Open**
- 7:00-8:00** **Buffet Breakfast**
- 8:00-9:00** **Attaining sustainable growth through Innovation Excellence**
David Parsons, Vice President with Hitachi Consulting.
-  Mr. Parsons leads the Innovation Practice globally, and is now working closely with Hitachi Limited sister companies and partners to help companies incorporate the leading industry trends into their business models and offering portfolios.
- Innovation is at the heart of a company's ability to sustain growth. This session explores the key ingredients to effective innovation programs, why companies often struggle to attain desired results, and some key insights to enable innovation as part of the sustainable business fabric.
- 9:00-9:30** **Refreshment Break**
- 9:30-10:30** **Panel – A founders perspective on innovation; How we Innovate**
Panelists: Ryan Caldwell, CEO, MoneyDesktop, Mike Ferrari, Co-Founder, Social Money, Andy Greenawalt, CEO, Continuity Control and Don Shafer, Chairman, Co-founder BancVue. Moderator: Shawn Ward, Co-Founder, Geezeo.
- We are living through an unparalleled technology revolution: social media has changed how we can interact with customers, smart phones and tablets are changing when we interact, and soon wearable technology may change what it means to interact. Innovation is happening faster than ever while product life cycles are shrinking at an equally rapid pace. How do we help our clients take advantage of these latest trends and innovations? Join us for a thought provoking panel where we will be discussing lessons learned and strategies with Leading Innovators who have built fast growing, innovative companies in a heavily regulated environment
- 10:30-11:00** **Refreshment Break**

11:00-12:00

Interactive Session

Moderators: Wade Arnold, Founder and CEO, Banno and John Waupsh, CIO and Chief Creative Officer, BancVue.

This lively open-forum session features topics of vital current interest taken directly from the audience and is always among the highest rated and most valuable conference sessions. An AFT "institution"

12:00-1:30

Luncheon and Work Break

Sponsored by EFT Source, Inc.

1:30-2:30

Emerging Trends

Anil Aggarwal, Chairman and CEO, Money2020.



Anil D. Aggarwal is the Chairman & CEO of Money2020. He previously started two emerging payments processors--TxVia, acquired by Google in 2012, and Clarity Payment Solutions, acquired by TSYS in 2004. He has raised over \$75m in venture capital from investors that include Oak Investment Partners and Bain Capital Ventures. Throughout his career, Anil has been committed to industry development initiatives, including founding a leading nonprofit trade group, the Network Branded Prepaid Card Association (NBPCA).

2:30-3:00

Refreshment Break

Sponsored by CUNA Strategic Services

3:00-4:00

Beyond Balance: How work Life Integration Leads to Fulfillment



Speaker Dan Thurmon, author of two books, a renowned speaker, and a recognized expert in delivering peak performances-on stage and in the workplace.

As president of Motivation Works, Inc., he has worked with hundreds of clients and delivered thousands of presentations worldwide. Dan helps organizations and individuals implement actions plans and move confidently through transitions. **(Spouse Guests Invited)**

4:00

Afternoon Business Break

6:00-7:00

Farewell Reception

Sponsored by Computer Services, Inc.

Stay Tuesday evening for a fun and casual farewell to Hyatt Regency Hill Country. Enjoy food and drink as we say goodbye to friends until next time.

7:00

Networking with AFT Facilitated Group Dinners

Select a group to dine with at the Hyatt Regency Hill Country.

***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 2014 Fall Conference September 14-16, 2014 at The Greenbrier, White Sulphur Springs, WV

AFT Golf Outing Sunday, March 16, 2014 Hyatt Hill Country Golf Club

The Hill Country Golf Club is a spectacular resort course with 27 holes of pure heaven ranked the #1 Texas golf destination and #17 worldwide. This beautiful, dramatic and balanced course, carved out of the Texas Hill Country landscape, is a challenging and rewarding golf adventure. Set on 300 lush acres, the course offers a diverse terrain, with lovely rolling meadows, steep hillsides, wooded ravines, tree-shaded plateaus and the tranquil threat of lakes and ponds.

Players of all skill levels are invited with the emphasis on fun and networking with peers. We will have two divisions; individual stroke play and a four-person Scramble, with prizes awarded to the winners in both divisions.



Don't miss this opportunity to "tee it up" with other AFT members and enjoy a fun-filled afternoon of golf and camaraderie in a beautiful setting conveniently located on the resort property. The \$140 entry fee includes greens fee, GPS-equipped cart rental, practice facility, tee gift and box lunch. Calloway rental clubs are available for an additional \$65. Guarantee your spot. Sign up today!

AFT Sand Volleyball Tournament Sunday, March 16, 2014



Calling all volleyball players and would-be volleyball players. It doesn't really matter. Join in the fun at the Hyatt Regency Hill Country's sand volleyball court for a friendly-yet-competitive sand volleyball tournament. What better way to enjoy a balmy Texas afternoon than to play a few hours of volleyball with your AFT colleagues and spouses? There will be two courts set up with referees, scoring, teaming and awards. Refreshments, too.

We need at least 24 players for this popular, fun-filled event which began as an alternative to golf . . . but has rapidly become an AFT tradition. Spread the word about this fun and healthy way to spend an early afternoon with other AFT conference attendees. Who knows, your team could win the Gold Medal.

Talk about team-building: Set... Dig... Spike! Sign-up on the Conference registration form . . . today!

Special Event – A True Texas Barbecue, Mini-Rodeo, Shootout and Dance

– Sponsored by FIS*

Cowboys and cowgirls: dust off your boots, put on your jeans and brightest bandana, wear your 10-gallon hat . . . and get set for a fun-filled evening of great food, drink and entertainment. Ride the mechanical bull. Beat the “bad guy” in the fast-draw contest. Cheer for your favorite in the Armadillo races. Indulge in true Texas-style



cowboy cooking with steaks, chicken and all the fixins’. Dance to the upbeat music of an authentic Texas Swing band. It’s all there at the always popular and never disappointing AFT Monday Evening Special Event in a spectacular, outdoor Texas Hill Country setting. Yee-haw!

Windflower The Hill Country Spa

Set amidst 300 acres of wildflowers and meadows, our tranquil spa invokes a sense of traveling back in time, to a simpler way of life. Indulge in a relaxing massage using native Hill Country ingredients. Throughout your stay at our spa, experience the warmth of authentic Texas hospitality, making you feel instantly at home and relaxed. AFT attendees get a discount of 10%. Be sure to mention you are attending the AFT Spring Conference to receive a special 10% discount on all spa services.



Hotel Information

Experience true Texan hospitality at the luxurious Hyatt Regency Hill Country Resort and Spa. This charming San Antonio area resort indulges every sense with outstanding amenities for relaxing, playing, meeting, dining and enjoying the beautiful Texas Hill Country.

The Hyatt Regency is ready to accept room reservations at the special AFT Conference rate of only \$211/night single/double occupancy. Reserve your room online at https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=10698225

or by calling (800) 663-7313 and mentioning the AFT Spring Conference.

Do not delay! Our specially priced rooms are limited and will sell-out fast. Come early and/or stay after the conference. The Hyatt Regency Hill Country will honor the special AFT rate for 3 days prior and 3 days immediately after our event. You simply do not want to stay anywhere else. Do it now! The special AFT room rate expires on February 14, 2014.

Transportation

San Antonio International Airport
Approximately 25 minutes to Hyatt Regency Hill Country
Cab Fare- \$43 each way
Elegant Limo & Charter Services- \$ 85 each way inclusive of tip (210) 225-5466

For a list of Ground Transportation at San Antonio International Airport:
<http://www.sanantonio.gov/SAT/GroundTransportation.aspx>

Thanks to our following AFT Member companies whose generous sponsorships have helped us present an outstanding 2014 Spring Conference

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Burroughs



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