



# OPERATIONS, SECURITY & TECHNOLOGY CONFERENCE

April 21 – 23, 2025

Margaritaville Lake Resort

Osage Beach





# COMMITTEE



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# AGENDA



## MONDAY, APRIL 21

2 p.m. Registration & Trade Show Opens

3 – 4 p.m.

**Fintechs: Why They are Important Partnerships for Banks**  
Fabio Biasella, Director of Strategic Services | Engage fi



NEW SESSION

Today's customers face a range of unique challenges, from the rising costs of homes and vehicles and the burden of student loan debt to the struggle of preparing for retirement, living paycheck to paycheck and navigating the increasingly gamified world of financial services. Banks are facing existential challenges as the consumption of banking services is increasingly unbundled from the traditional financial services industry, and banks must look for differentiation digitally. Customers are no longer satisfied with rejuvenation projects that give them a cleaner experience. Instead, they desire a complete financial experience allowing them to bank, pay, trade, plan and budget so they can live smarter financial lives. This session defines the concrete possibilities of fintech partnerships to position banks to develop new revenue streams and build lasting loyalty with customers.

4 – 4:15 p.m. Refreshment Break in Trade Show

4:15 – 5:15 p.m.

**How to Strengthen your Identity and Access Management**  
Cal Roberson, Vice President of Financial Institution Division | Integris



NEW SESSION

Discover the crucial security measures community banks should establish before implementing Identity and Access Management (IAM). This presentation will provide insights into data protection, employee training, and network security, creating a strong security foundation. Attendees will gain practical knowledge to fortify their bank's defenses, ensuring a more secure environment before delving into IAM strategies. Join us for this essential session to safeguard your bank's assets and customer data effectively.

5 – 6 p.m. Reception & Vendor Networking

## TUESDAY, APRIL 22

7 – 8 a.m. Registration & Breakfast

8 – 8:15 a.m. Call to Order & Welcome

8:15 – 9:15 a.m.

**The Hacker's AI Playbook: Unraveling the Impact of Artificial Intelligence on Social Engineering and Cybersecurity**

James McQuiggan, Security Awareness Advocate | KnowBe4



Artificial intelligence has revolutionized the world, providing unprecedented automation, analytics and decision-making capabilities. However, the rapid advancements in AI technology also have led to the emergence of sophisticated social engineering attacks that pose significant challenges to individuals, businesses and governments. This session explores the impact of AI on social engineering, including understanding how cybercriminals are using AI to evolve their attacks, how AI is impacting our society in ways we may not even know about and what you can do to spot enhanced AI social engineering attacks.

9:15 – 9:30 a.m.

Refreshment Break in Trade Show



# AGENDA



## TUESDAY, APRIL 22

9:30 – 10:30 a.m.



### Communicating During a Crisis

Patrick Dix, Vice President of Client and Association Engagement | Shazam

You've just had a critical incident at your business. Reporters are waiting outside with cameras. Are you ready? There's a way to make sure you won't be searching for answers when you find yourself in this position. The 24-hour news cycle means local news organizations are hungrier than ever for fresh content and credible experts. This session makes the case that developing relationships with local media and that saying "yes" when they call for your help will pay off for your reputation, your business and your bottom line.

10:30 – 10:45 a.m.

### Refreshment Break in Trade Show

10:45 – 11:45 a.m.



### Banking on AI

David Markley, President | Stronghold Data

This presentation takes a closer look at why banks should be using the power of AI and showcases relevant and timely examples of how banks are using AI. This session highlights the impact and functions of AI for financial institutions and addresses the importance of safely integrating AI so that all data is protected. Various case studies and demos using Copilot, Microsoft's AI platform, conclude this presentation.

11:45 a.m. – 12:45 p.m.

### Lunch

12:45 – 1:45 p.m.



### Fraud Payment – Instant Payment Should Not Equal Instant Fraud

Elissa Brewer, CAMS, Senior Risk Management Consultant | Abrigo

Payments, faster payments, instant payments. All the convenience is great for customers but also is a hunting ground for fraudsters. Institutions are seeing several fraud schemes related to payments and are taking losses. Examine faster payment fraud trends and mitigation techniques to help your financial institution fight fraud.

1:45 – 2 p.m.

### Refreshment Break

2 – 3 p.m.



### Top 10 Tech Audit Recommendations

Christy Thomas, CPA, CISA, CISM, CDPSE, CBSM, Audit Manager | SBS CyberSecurity

A strong information security program goes beyond documentation — it relies on implementing and testing effective controls. IT audits play a crucial role in identifying gaps and driving cybersecurity improvements. This session reveals the 10 most common IT audit findings from the past year and provides actionable insights to help strengthen your ISP. Learn how to address these findings proactively and position your organization for success in your next IT audit. You'll leave ready to enhance your cybersecurity resilience.

3 – 3:15 p.m.

### Refreshment Break



# AGENDA



## TUESDAY, APRIL 22

- 3:15 – 4:15 p.m. Regulator Panel – IT Exams**  
Andy Forinash, Federal Reserve Bank of St. Louis  
Nick Leapley, Missouri Division of Finance  
A.J. Steiger, Jr., CISA, FDIC

Now more than ever, it is critical to hear from both the state and federal banking regulatory agencies. Representatives will discuss current trends in operations and technology regulation, including internal controls and contingency planning. This session provides an opportunity to ask questions of various agencies and bring you up-to-date on regulatory issues.

- 4:15 – 4:30 p.m. Refreshment Break**

- 4:30 – 5:30 p.m. Leveraging Your Bank's Growth Potential**  
Tanna Faulkner, Senior Vice President of Sales and Digital Channels | DCI



Discover how to leverage your bank's core solution to venture into fintech initiatives that can add additional services and revenue income for your bank, whether you're looking to offer a separately-branded digital bank, partner with a third-party fintech provider or deliver sponsor-bank services for fintech providers. Learn how it's now possible to venture into these fintech initiatives with no need for expensive third-party middleware and how partnering with the right core environment can give your bank more negotiating power.

- 5:30 – 6:30 p.m. Networking Reception**

## WEDNESDAY, APRIL 23

- 7 – 8 a.m. Breakfast**

- 8 – 9 a.m. Data Wars: 1033 and Winning in the New Open Banking Era**  
Lee Wetherington, Senior Director of Corporate Strategy | Jack Henry



The Consumer Financial Protection Bureau issued its final rule governing open banking and "personal financial data rights." How will consumers' ability to share financial data impact your bank, and what should you do about it? In 2025, successful banks will use open-banking rails to expedite account opening, solve financial fragmentation, achieve first-app status, eliminate inbound screen scraping, improve authentication/security, streamline underwriting and reclaim their position at the center of their customers' financial lives — allowing those customers to see, share and control all of their financial data easily and securely in one location (your bank). What's your open banking strategy? How does it inform or support your data strategy? Join Lee Wetherington for insights on how to capitalize on new opportunities in the open-banking era.

- 9 – 9:15 a.m. Refreshment Break**

- 9:15 – 10:15 a.m. AI and Cybersecurity: Preparing for the Future of Cyber Threats**  
Dave Detweiler, Managing Director | SEI Sphere



AI is awesome ... but attackers use it too. How do you prepare your business in the AI age? This session provides a forward-looking perspective on how AI will influence the evolution of cyber threats and defenses. Learn about emerging AI technologies, potential future threats and how to prepare your organizations for the next generation of cyber challenges. The session covers the importance of continuous learning and adaptation in the face of rapidly evolving AI capabilities.

- 10:15 – 10:30 a.m. Refreshment Break**





# AGENDA



## WEDNESDAY, APRIL 23

**10:30 – 11:30 a.m.**    **How CISA Can Help Your Bank**  
Robert Graham, CISSP, Cyber Security Advisor, Cybersecurity and Infrastructure Security Agency | U.S. Department of Homeland Security

CISA works that “Left of Boom” approach to help your organization prepare for bad days by creating partnerships and offering no cost tools and resources to help organization make their systems more secure and resilient.

**11:30 a.m. – 12:30 p.m.**    **Lunch**

**12:30 – 1:30 p.m.**    **Examiner Expectations for Cyber Risk Management**  
Randy Lindberg, Founder | Rivial Data Security



Effective cyber risk management is a challenge for banks of all sizes because of the lack of specific guidance on how to manage these risks successfully. Examine the core elements of an information security risk management program and advanced ways to improve risk measurement. This session discusses examiner expectations and introduces a maturity matrix designed to help banks evolve toward more sophisticated risk management practices in building a more efficient and effective cybersecurity program.

**1:30 – 1:45 p.m.**    **Refreshment Break**

**1:45 – 3:30 p.m.**    **Comprehensive De-Escalation**  
Tim Keck, Senior Consultant | SafeHaven Security Group



As stress increases across our society, anger and conflict have increased as well. For many, physical violence is becoming an ever more acceptable answer to problems, even in the workplace. Very few people have had an opportunity to learn how to successfully navigate these stormy seas ... until now.

This session draws on expertise from psychology, crisis management, mental health, law enforcement and more, providing a comprehensive approach to safety in interpersonal conflict. Although there is a strong emphasis on verbal skills, other factors include body language, proxemics and proper mindset. This approach empowers individuals to handle almost any professional and personal situations they may encounter in life.

**3:30 p.m.**    **Adjourn**



# CONTINUING EDUCATION



American Bankers Association®

American Bankers Association (ABA) Professional Certifications has approved 2025 **Operations, Security & Technology Conference** for:

**9.75 CRCEM, 8.5 CERP, 3.75 CAFPP credit. APPROVED NON-ABA CE search for training will appear as: Missouri Bankers Association | 2025 Operations, Security & Technology Conference**



# GENERAL INFORMATION



## Who Should Attend

This conference is designed for those who are responsible for physical security, cybersecurity, fraud, IT planning, network administration, information security and operations, as well as any others who are responsible for making technology decisions at your bank, including senior management.

## Registration Information

Payment by Phone, [mobankers.com](http://mobankers.com) or Invoice Fees

**MBA-Member:** First Registrant - \$450 | Each Additional (per person) - \$400 | 4 or more per person - \$375

**Nonmember:** \$1,800

**Conference Materials Printed Copy:** \$100

Contact the [MBA Education Department](#) for group discount.

The cost of meals included in this registration fee for this conference is \$165. This information is provided for your bank's tax records, in keeping with the IRS 50% deductible provisions under Section 274(n) of the Internal Revenue Code.

*\*Fees include meals, reception, refreshment breaks and conference materials. These fees do not include hotel accommodations.*

## Conference Materials

Registered attendees will be able to access handouts through the conference app for free. For those who prefer printed handouts, there is an additional \$100 fee that must be paid with the registration fee. Printed handouts will only be available to conference attendees who prepaid for the materials. Please note that some handouts will not be available as some speakers do not share their presentations. MBA is recording all conference sessions, and an email with a link to the recordings will be sent after the conference.

## Cancellation Policy

Full refunds will be granted for cancellations received by MBA at least 10 days before the conference date. After that date, an administrative fee of \$10 per canceled registration will be retained. Cancellations will not be accepted five days before the conference. Substitutions are always permitted.

## Dress Attire

Business casual is recommended for all sessions.

## Hotel Information

The seminar will be held at Margaritaville Lake Resort at the Lake of the Ozarks. Overnight accommodations are available at the hotel.

### Margaritaville Lake Resort Lake of the Ozarks

494 Tan Tara Estate Drive  
Osage Beach, MO 65065  
573-348-3131

**Hotel Group Rate of:** \$134 per night

**Cutoff Date For Room Block:** March 23, 2025

Be sure to state you are attending the Missouri Bankers Association's Operations, Security, Technology Conference.

Room availability is not guaranteed after the cutoff date, and room rates may revert to the published rate. Early reservations are encouraged!

## Disabilities and Dietary Restrictions

If you have any dietary restrictions or disabilities and need assistance, please email [elawson@mobankers.com](mailto:elawson@mobankers.com).

## Image Use Policy

Registration or participation by an individual in attending Missouri Bankers Association events and activities constitutes an agreement by the attendee to the MBA's use and distribution, both current and future, of the attendee's name, image or voice in print, media, social media, photographs, videotapes, electronic reproductions, and audiotapes of, or reporting, such events, and activities and promoting MBA activities, services and programs. Attendees waive any right to inspect or approve the finished materials and MBA communications and publications and agree that all such images, pictures, video or audio recordings, and any reproduction thereof, shall remain the property of the MBA to use at its discretion. Consent is binding, perpetual and may not be revoked.

## Questions

If you have questions concerning any part of this conference, please call the MBA Education Department at 573-636-815.



# REGISTRATION FORM



Please PRINT or TYPE below. You may photocopy this form for additional registrants.

**Organization Information** \_\_\_\_\_

**Bank** \_\_\_\_\_

**Address** \_\_\_\_\_ **City/State/ZIP** \_\_\_\_\_

**Phone** \_\_\_\_\_ **Fax** \_\_\_\_\_

**Name of Attendee** \_\_\_\_\_

**Name** \_\_\_\_\_

**Title** \_\_\_\_\_

**Email** \_\_\_\_\_

**Name of Attendee** \_\_\_\_\_

**Name** \_\_\_\_\_

**Title** \_\_\_\_\_

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**Name of Attendee** \_\_\_\_\_

**Name** \_\_\_\_\_

**Title** \_\_\_\_\_

**Email** \_\_\_\_\_

**Method of Payment** \_\_\_\_\_

First Registrant.....\$450 # \_\_\_\_\_ \$ \_\_\_\_\_

Each additional.....\$400 # \_\_\_\_\_ \$ \_\_\_\_\_

4 or more per-person..\$375 # \_\_\_\_\_ \$ \_\_\_\_\_

Nonmember.....\$1,800 # \_\_\_\_\_ \$ \_\_\_\_\_

Conference Materials....\$100 # \_\_\_\_\_ \$ \_\_\_\_\_  
*Printed Copy*

**Total Amount Due** \$ \_\_\_\_\_

*\*Contact the MBA Education Department for group discount.*

*\*Fees include meals, reception, refreshment breaks and conference materials. These fees do not include hotel accommodations.*

Invoice the bank.

Credit Card Payment\* (Please type.)

*Exp. Date* \_\_\_\_\_ *CVV* \_\_\_\_\_

*No.* \_\_\_\_\_

*Type Name* \_\_\_\_\_

*Signature* \_\_\_\_\_

**Three Ways to Register**

573-636-8151

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Mail check payable to Missouri Bankers Association and form to:

Missouri Bankers Association  
P.O. Box 57  
Jefferson City, MO 65102