

**Tuesday – June 8, 2021**

TIME	CORE SESSION TRACK	BALANCE SHEET MANAGEMENT TRACK	CREDIT UNION TRACK
11:30–12:50	<b>Opening Remarks &amp; Economic Update</b> Matt Pieniasek – Darling Consulting Group & Greg Daco – Oxford Economics		
12:50–1:00	<b>Break</b>		
1:00–1:50	<b>Risk/Return Trade-Offs &amp; Current Issues in Balance Sheet Management</b> Jeff Reynolds – Darling Consulting Group	<b>That Was Then, This Is Now! Balance Sheet Management Strategies for the Current Environment</b> Frank Farone & Steve Boselli – Darling Consulting Group	<b>2021 Summary: Secondary Capital/Sub-Debt for Credit Unions – What’s New?</b> Bob Colvin – CU Capital Market Solutions
1:50–2:30	<b>Break</b>		
2:30–3:20	<b>Measuring &amp; Managing Liquidity</b> Keri Crooks – Darling Consulting Group	<b>When Plain Vanilla Investing Is Anything But Plain Vanilla</b> Larry Miele – Wells Fargo Advisors Tom Doe – Municipal Market Analytics	<b>3 Keys to Investment Success in Any Environment</b> Chris Nelson – Nelson Capital Advisors
3:20–3:30	<b>Break</b>		
3:30–4:20	<b>Measuring &amp; Managing Interest Rate Risk</b> Darnell Canada & Bob Lallo – Darling Consulting Group	<b>Managing the Liquidity Pandemic</b> Jeff Reynolds & Billy Guthrie – Darling Consulting Group	<b>Reinvigorating Your Liquidity Planning Process</b> Joe Kennerson – Darling Consulting Group
4:20–4:30			
4:30–5:20			

**Wednesday – June 9, 2021**

TIME	CORE SESSION TRACK	BALANCE SHEET MANAGEMENT TRACK	CREDIT UNION TRACK
12:00–12:50	<b>Developing &amp; Documenting Balance Sheet Management Strategies</b> Keith Reagan & Patrick Ward – Darling Consulting Group	<b>Practical Derivative Strategies for All Institutions</b> Dave Sweeney & Todd Cuppia – Chatham Financial	<b>Derivatives: A Must-Have Tool for IRR Managers and NCUA Approved!</b> Zach Zoia & Mike Mitchell – Darling Consulting Group
12:50–1:00		<b>Break</b>	
1:00–1:50		<b>Credit Analysis in a Post-Pandemic World</b> Justin Bakst, Steve Boselli & John Demeritt – Darling Consulting Group	<b>A New Measure of Success: Re-evaluating the Income Statement</b> Frank Farone – Darling Consulting Group
1:50–2:30	<b>Break</b>		<b>MODEL RISK MANAGEMENT TRACK</b>
2:30–3:20	<b>Balance Sheet Management Strategies Case Studies</b> Mike Carney & Vinny Clevenger – Darling Consulting Group	<b>Deposit Strategies: Past, Present, and Future</b> Matt Pieniazek, Joe Kennerson & Jon Weiner – Darling Consulting Group	<b>Managing the Not-So-Hidden Costs of Model Risk Management</b> Hannah Glasrud & Mark Haberland – Darling Consulting Group
3:20–3:30		<b>Break</b>	
3:30–4:20		<b>Optimizing Retail &amp; Business Delivery Channels</b> Richard Buttermore – Paramount Financial Technologies	<b>A CECL Case Study: Designing and Implementing Model Monitoring</b> Chase Ogden – Darling Consulting Group

**Thursday – June 10, 2021**

<b>TIME</b>	<b>BALANCE SHEET MANAGEMENT TRACK</b>	<b>MODEL RISK MANAGEMENT TRACK</b>
<b>12:00–12:50</b>	<b>Examining Your Loan Strategies Through Different Lenses</b> Matt Pieniazek & Zach Zoia – Darling Consulting Group	<b>The ABCs of BSA: Rightsizing Your Bank Secrecy Act Program for Today’s World</b> Sam Chen – Darling Consulting Group
<b>12:50–1:00</b>	<b>Break</b>	
<b>1:00–1:50</b>	<b>Navigating Uncertainty: A Commercial Real Estate Market Overview</b> Aaron Jodka – Colliers	<b>Six Ways to Inspire Confidence in Your ALM and Liquidity Modeling</b> Andy Mitchell & Tim Daniels – Darling Consulting Group
<b>1:50–2:30</b>	<b>Break</b>	
<b>2:30–3:20</b>	<b>Post-Pandemic M&amp;A Environment and Outlook</b> Frank Cicero – Keefe, Bruyette & Woods	<b>Credit Risk Modeling: DFAST, CECL, and Where We Go from Here</b> Ty Lambert – BancorpSouth Joe Montalbano – Darling Consulting Group
<b>3:20–3:30</b>	<b>Break</b>	
<b>3:30–4:30</b>	<b>Managing Competing Objectives: A Post-COVID Leadership Reality</b> Keith Hughey – J. Keith Hughey Co.	
<b>4:30–4:35</b>	<b>Closing Remarks</b> Matt Pieniazek – Darling Consulting Group	