

CFO Forum

Where Florida Financial Leaders Connect

MEET THE SPEAKERS



Matt Babicz
Plante Moran
Cybersecurity Sr.
Manager

Matt Babicz is a passionate cybersecurity auditor and consultant with a decade of experience supporting clients on their cybersecurity journeys. He primarily serves the financial services industry, with additional experience in manufacturing, healthcare, and the public sector. Matt strives to be a trusted advisor, helping organizations align business practices and strategic initiatives with their cybersecurity posture. His specialties include cybersecurity framework audits and implementations, IT and information security audits, compliance audits (GLBA, SOX 404, FDICIA), incident response and business continuity assessments, and vendor management reviews. An active member of the security community and the ISACA Chicago Chapter, Matt holds a CISA certification. He earned a Bachelor of Science in commerce and finance from DePaul University.



Pete Baksh
First Ntl. Bank of Mt. Dora
Chief Investment Officer

Pete Baksh is Chief Investment Officer at the First National Bank of Mount Dora, where he leads a team of investment professionals managing approximately \$1.1 Billion in discretionary assets. He is also an outside director of a publicly traded fintech and trading firm and is a member of the Federal Reserve Bank of Atlanta's Business Inflation Expectations Panel. He has had extensive experience as a trader in the equities, fixed income and commodities markets along with portfolio management and leadership roles. He is a frequent commentator on monetary policy and uses economic reports in forecasting market conditions and formulating investment strategy.



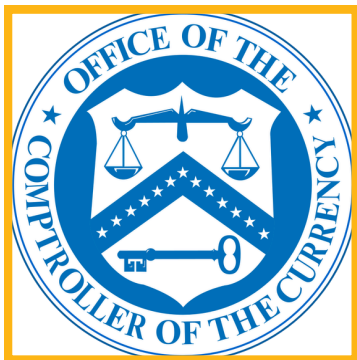
Donald Bardwell
FRB Atlanta
Dir. of Examinations

Donald Bardwell is the Director of Examinations at the Federal Reserve Bank of Atlanta, where he plays a key role in overseeing financial institutions and regulatory compliance. With extensive experience in banking supervision, he ensures the stability and integrity of the financial system. Donald is a graduate of the prestigious Pacific Coast Banking School, further solidifying his expertise in the field. His leadership and strategic insights contribute to the effective management of banking regulations and risk assessments. Passionate about financial oversight, he remains dedicated to maintaining sound banking practices that support economic stability and growth.



Alek Bevenssee
Elliott Davis
Director

Alek Bevenssee leads many of the firm's model risk management engagements, providing full-scope model validation and value-add consulting services to financial institutions related to Current Expected Credit Losses (CECL), Asset Liability Management (ALM), credit stress testing, and special purpose models. He also has experience in the areas of internal controls (SOX/FDICIA), regulatory compliance, and data analytics. Previously, Alek led several firm initiatives related to the use of emerging technologies and data analytics, helping to establish the firm's data analytics service line.



LaTisha Boyd
OCC
Assistant Deputy
Comptroller

LaTisha Boyd manages the Tampa and Jacksonville offices of the Comptroller of the Currency (OCC). She is responsible for 15 financial institutions, with over \$12 billion in assets and supervises a team of 23 bank examiners. LaTisha joined the OCC in 2004 and has held several positions, include Team Leader in the Miami office and Examiner in Charge of a \$14 billion financial institution. She received her National Bank Examiner commission in 2010 and completed the Federal Thrift Regulator process in 2014. She has served as a FinCen Analyst, completed policy rotations, and a training instructor. LaTisha is a graduate of the University of Arkansas at Pine Bluff.



ShaDonte Butler
FHLB ATL
Sr. Affordable Housing
Program Relationship
Mgr.

As Senior Affordable Housing Program Relationship Manager, **ShaDonte Butler** focuses on cultivating and expanding the Bank's customer relationships and driving new business to the Bank through its Community Investment Products. Prior to joining the Bank in 2009 she worked in a variety of roles within Fannie Mae's Single Family Mortgage Division. Ms. Butler also assisted a variety of lenders implement strategies to effectively reach underserved markets. Ms. Butler earned a Bachelor of Science degree in finance and economics (summa cum laude) from Fisk University in Nashville, TN, a Master of Business Administration specializing in Finance from Clark Atlanta University, and a Master of Science in Building Construction/Residential Development from Georgia Tech. She resides in Atlanta, Georgia.



Ginny Childs
Akerman, LLP
Orlando Office
Managing Partner

Ginny Childs is a commercial litigator specializing in business torts, complex commercial foreclosures, non-compete agreements, creditors' rights, and real estate and lender liability. As an experienced lead trial lawyer, she has secured complete verdicts for clients in two jury trials. In one trade secrets case, her successful *Daubert* motion regarding enterprise value loss led to a favorable settlement. Recently, she represented government agencies in two notable public records cases concerning whether security camera footage is confidential under Florida's public records laws. She also brings extensive experience in tort and insurance-related litigation, representing global corporations in matters involving premises security, pre-employment background screening, and Fair Credit Reporting Act compliance.



John Findlay
LemonadeLXP
CEO

John Findlay is the CEO and co-founder of LemonadeLXP, the award-winning learning and knowledge platform for financial institutions. With decades of experience in digital engagement and training, John leads the charge in helping banks and credit unions modernize staff onboarding, support, and compliance through AI-powered tools and engaging learning experiences.



Justin Heck
Plante Moran
Cybersecurity Manager

Justin Heck is a seasoned Manager boasting 10+ years of experience in information systems and cybersecurity, with a focused expertise in cloud security and cybersecurity solutions. His extensive track record encompasses delivering tailored solutions to clients across diverse sectors such as finance, government contractors, healthcare, education, and nonprofit organizations. Throughout his career, Justin has demonstrated proficiency in navigating various IT security control frameworks, notably CMMC, NIST 800-171, PCI-DSS, and HIPAA. He excels at assessing organizational IT risks, thoroughly evaluating control effectiveness, identifying vulnerabilities, and devising strategic recommendations to remediate control deficiencies. Justin earned a Bachelor of Science degree in information systems and cybersecurity, along with an Associate degree in computer networking. He also holds and maintains numerous certifications, including CISSP, Lead CCA, CCP, CC, AWS Certified Security, and Microsoft Certified Security.



Steve Hopkins
Wipfli Advisory LLC
Director

Steve Hopkins leads the leadership consulting team, as part of Wipfli's Organizational Performance group, focused on helping clients develop their people, their culture and, ultimately, their organizations. For the past decade, Steve has led and championed leadership development and executive coaching programs through his consulting work, building on a career as a leader of people.



Ryan Jackson
ABA
VP Innovation Strategy

Ryan Jackson is Vice President, Innovation Strategy at the American Bankers Association, where he supports the Office of Innovation. In this role, Ryan supports banks to define innovation strategies and helps shape the technology marketplace by identifying promising startups that complement the banking industry. Prior to joining the ABA, Ryan built Fannie Mae's Enterprise Innovation Team focused on emerging and disruptive technologies within the mortgage ecosystem. He also previously worked on the debt and derivatives capital markets group at Fannie. Ryan received his MBA from the Fuqua School of Business at Duke University and completed his undergraduate degree in economics and finance from George Mason University.



Diana Kern
SHAZAM
Sr. Financial Solutions
Consultant

A veteran payments professional and longtime SHAZAM employee, **Diana Kern** has more than three decades of industry experience. Always on target as a guest speaker, audiences welcome her practical insights on emerging payments, industry trends and the impact on financial institutions. She explains seemingly complicated things in a simple, relatable way, helping others understand what it means to them. A self-described payments nerd, Diana's enthusiasm and passion for all things payments results in a high-energy presentation.



Brandon Maggard
FBA Insurance Services
Financial Institutions
Specialist

Brandon Maggard currently resides in Louisville, KY and is a graduate of Western Kentucky University. Brandon now has 13 years of insurance experience, 10+ years with specifically Financial Institutions. Brandon is fully licensed in multiple states and his role is to provide insurance solutions to community banks of all sizes. When not working, Brandon enjoys golf and spending time with his family.



Joe Matthews
OFR
Area Financial Manager

Joe Matthews rejoined the Florida Office of Financial Regulation in 2024, as the Area Financial Manager for the Orlando region, where he oversees the examination and monitoring processes for state-chartered banks within Central Florida. Prior to rejoining the OFR, he spent 11 years in compliance capacities for financial institutions, primarily based in Chicago, IL, and most recently served as the Chief Compliance Officer of a 20-billion-dollar financial institution, at which, Joe oversaw the Global Financial Crimes and Sanctions Units. Before entering the private sector, Joe spent 14+ years at the OFR within various roles, including bank and credit union safety and soundness examinations and supervision, licensing and chartering, and legal. He holds a Bachelor of Science degree in Finance from FSU and a Juris Doctor degree from Florida Coastal School of Law.



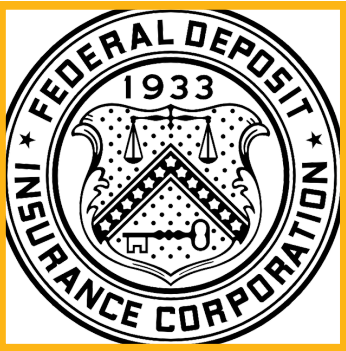
Connie Nelson
United Southern Bank
CFO

Connie Nelson is the EVP and CFO of United Southern Bank. She worked in public accounting prior to joining USB 32 years ago. The Florida Bankers Association has provided her an outlet for spreading her passion for continuous education. She also serves on the board of the FBA Educational Foundation, is a Director at the Florida School of Banking, and is on the planning committee of the CFO Symposium. She is a native Floridian, FSU graduate, NC State post-graduate, LSU School of Banking graduate and a CPA. She loves cross fit, yoga, running, biking, traveling and is devoted to her family.



Lauren Nilan
Elliott Davis
Principal

Lauren Nilan provides assurance and advisory services to financial institutions up to \$20+ billion in assets. She specializes in PCAOB and AICPA financial statement audits, integrated internal control audits (SOX and FDICIA), HUD audits, and outsourced/co-sourced SOX/FDICIA testing. Additionally, she has experience with initial public company registrations, internal control identification/implementation, and other agreed upon procedures engagements. Lauren also spent five years serving as the Risk Officer for an SEC registrant community bank.



Craig Price
FDIC
Assistant Regional
Director

Craig Price is an Assistant Regional Director at the FDIC's Atlanta Regional Office, where he has served for nearly 21 years in roles including Case Manager and Bank Examiner. He has led safety and soundness examinations for financial institutions with CAMELS ratings from 1 to 5, including those under enforcement actions. Mr. Price has also managed regulatory applications, investigations, and enforcement processes. He has completed detail assignments in both the Atlanta Regional Office and FDIC headquarters in Washington, D.C. He holds a BBA from Troy University and is a graduate of the Stonier Graduate School of Banking at the University of Pennsylvania.



Joel Updegraff
Brean Capital
Managing Director

Joel Updegraff joined Brean Capital in 2022 as a Managing Director of Depository Services within the Financial Institutions Group, based in Brean's Memphis Office. He has decades of experience in the development and implementation of asset/liability management (ALM) services and consultation for financial institutions, depository-focused broker/dealers, and depository regulatory agencies. Joel has developed a unique, regulatory-sensitive approach to assisting depositories with their ALM, risk/return optimization, and capital markets initiatives. He began his career in 1990, working as an FDIC Examiner. He held the position of Training Unit Chief, Office of Capital Markets, Division of Supervision in the FDIC's DC Headquarters. Joel also served as a senior examiner for the NCUA's Office of Corporate Credit Unions, assisting with the safety and soundness reviews of capital markets initiatives of the nation's corporate credit unions.



Eric Wimbush
FHLBank Atlanta
VP, Sr. Relationship
Manager

Eric Wimbush is Vice President and Senior Relationship Manager for the Federal Home Loan Bank of Atlanta (FHLBank Atlanta). In addition to his role at FHLBank Atlanta, Eric is also Partner and Director of Operations for Seraphim Wealth Advisors Inc. (SWAI), an Atlanta-based registered fiduciary investment advisory firm. Eric has more than 25 years of consultative and strategic sales experience, including prior roles with Edward Jones Investments, SunTrust Robinson Humphrey, and the Federal Reserve Bank of Atlanta. Eric earned a Bachelor's in Finance from Wofford College and a Master's in Business Administration and Finance from Georgia State University. Eric holds the Chartered Financial Analyst (CFA) designation as well. He also holds several securities licenses as well as licensing for Life, Health, and Variable Insurance Products.