



# CFO Forum

Where Florida Financial Leaders Connect

**May 14–15, 2026**

Renaissance Orlando Resort Disney Springs  
Lake Buena Vista, Florida

## THURSDAY | MAY 14

7:30am – 8:30am	<b>Registration &amp; Continental Breakfast</b>
8:30am – 8:40am	<b>Opening Remarks</b> Connie Nelson (Conference Chair & Emcee) United Southern Bank
8:40am – 9:40am	<b>Session 1:</b> <b>Economic Update</b> Speaker - Pete Baksh, FNBMD  The world has become a profoundly different place, when compared with prior recent decades. A sharp reversal of globalization, return to great power competition, shifting geopolitical alliances, and new constraints on international trade may lead to changes in economies and markets around the world. This session will review the basic concepts that underpin economic growth in both domestic and foreign markets, forward-looking capital market assumptions, and the implications for markets and bankers. The session is designed to provide a broad overview and framework for understanding the intersection of Economics and Business.
9:40am - 10:40am	<b>Session 2:</b> <b>Understand the Role of Executive Coaching</b> Speaker – Steve Hopkins, WipFli  In today’s dynamic business environment, effective leadership goes beyond managing—it requires empowering others to reach their full potential. This interactive session explores the principles of executive coaching and how to foster a coaching culture within your organization. Participants will gain practical strategies to enhance leadership impact, improve team performance, and create an environment where continuous learning and development thrive.
10:40am – 11:00am	<b>Networking Break (15 minutes)</b>
11:00am – 12:15pm	<b>Session 3:</b> <b>Exploring AI Trends in Banking</b> Speaker- Ryan Jackson, ABA  This presentation offers an overview of artificial intelligence and its role in the banking sector. Participants will explore the latest trends, innovations, and strategic opportunities for leveraging AI to enhance customer experiences, improve decision-making, and identify growth areas. The presentation also addresses ethical considerations, risk factors, and regulatory implications of adopting AI technologies.

<p><b>12:15pm – 1:30pm</b></p>	<p><b>Lunch with speaker</b>  <b>Session 4: The Affordable Housing Crisis and Finding Creative Solutions</b>  Speakers - Eric Wimbush and ShaDonte Butler, FHLB-ATL</p> <p>Dealing with the Affordable Housing Crisis has become one of the biggest challenges to the US economy and many urban and rural communities. Today we will define some of the challenges and discuss creative ways to attack this issue. There are many important stakeholders that offer solutions and are part of the equation. Addressing the crisis requires taking a holistic approach, which is mandatory to long term, sustainable success.</p>
<p><b>1:30pm – 2:30pm</b></p>	<p><b>Session 5:</b>  <b>Mergers &amp; Acquisitions</b>  Speakers – Lauren Nilan and Alek Bevensee, Elliot Davis</p> <p>For CFOs, successful mergers and acquisitions mean more than identifying opportunities—they require readiness, discipline, and leadership. Transaction success hinges on proactive planning, operational excellence, and clear communication. In this session, you will recognize key early questions to address readiness, post-deal goals, advisor engagement, and stakeholder impact. We will identify strong accounting practices—such as audit-ready data, normalized risk ratings, and integrated purchase accounting workbooks—to support defensible, efficient transactions. Leaders who champion strategic intent and disciplined execution position their institutions to seize opportunities, strengthen balance sheets, and deliver sustainable growth in a dynamic market.</p>
<p><b>2:30 pm – 3:30pm</b></p>	<p><b>Session 6:</b>  <b>Claims, Coverage, and Confidence: Strengthening your Bank’s Professional Insurance Program</b>  Speaker – Brandon Maggard, FBAIns</p> <p>This session will explore emerging claims trends impacting banks, focusing on how evolving risks are shaping losses across FI Bond, D&amp;O, and Cyber insurance. We will examine common and increasingly significant exclusionary policy language, highlighting where coverage disputes most often arise and what banks should be watching for. The discussion will conclude with practical best practices for risk management and claims preparedness.</p> <p>-We welcome you to come prepared to share insights on any claims issues your bank has encountered, or any other questions that you may have.</p>
<p><b>3:30pm – 3:45pm</b></p>	<p><b>Networking Break (15 minutes)</b></p>
<p><b>3:45pm – 4:45pm</b></p>	<p><b>Session 7:</b>  <b>The Value of the Second Network</b>  Speaker – Diana Kern, SHAZAM</p> <p>Most banks are sitting on an untapped source of revenue, and don’t even know it. With new pressures on interchange and rising network costs, understanding how your debit card transactions route over payment networks has never been more important. This session will teach you how the right combination of networks can dramatically increase profitability, expose common mistakes and misconceptions in your network setup and reveal the one decision that can make an immediate impact on your bottom line with no impact on your cardholders.</p>
<p><b>5:00pm – 7:00pm</b></p>	<p><b>Networking Reception</b></p>



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## FRIDAY | MAY 15

7:30am – 8:30am

**Breakfast & Networking**

8:30am – 9:30am

**Session 8:**

### **AI, Risk, and Readiness: How Artificial Intelligence is Reshaping Bank Training & Knowledge Management**

Speaker – John Findlay, Lemonade

Artificial intelligence is transforming bank training through continuous, role-specific knowledge support. Designed for CFOs, this session explores practical AI applications across onboarding, compliance, and fraud prevention. Attendees will learn how AI-driven training delivers measurable impact on risk mitigation, operational efficiency, and regulatory readiness while supporting sustainable growth.

9:30am - 10:30am

**Session 9:**

### **Legal Update**

Speaker – Ginny Childs, Akerman

Stay up to date with a comprehensive overview of recent regulatory actions specifically tailored to capture the strategic interest of Chief Financial Officers in the banking industry. This session delivers critical insights into new financial regulations, compliance mandates, and policy changes that could directly impact financial leadership and strategic decision-making.

10:30am – 10:40am

**Networking Break (10 minutes)**

10:40am – 11:30am

**Session 10:**

### **From Business Email Compromise to AI Exploits: Securing M365 and Copilot in Banking**

Speakers – Justin Heck and Matt Babicz, Plante Moran

Rising cyber threats are targeting Microsoft 365 and Copilot in financial institutions. This session examines real-world attack tactics including Business Email Compromise, phishing, malicious app consent, and MFA fatigue. Learn how default M365 and Copilot settings can expose sensitive data through misconfigured permissions, weak governance, and prompt-based attacks. Using case studies, attendees will gain practical steps to strengthen access controls, monitoring, and vendor oversight. Essential for institutions using or adopting Microsoft 365 and Copilot.

<p><b>11:30am – 12:30pm</b></p>	<p><b>Session 11:</b>  <b>Examination Hot Topics from A Regulatory Panel's View</b>  Moderator - Joel Updegraff, Brean Capital</p> <p>FDIC- Craig Price, Assistant Regional Director  OFR - Joe Matthews, Area Financial Manager  OCC – LaTisha Boyd, Assistant Deputy Comptroller  FRB - Don Bardwell, S&amp;R Director of Examinations</p>
<p><b>12:30pm</b></p>	<p><b>Closing remarks and adjourn</b></p>

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