



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

MONDAY, OCTOBER 21-  
FRIDAY, OCTOBER 25, 2024

THE VENUE AT PORTWALK PLACE,  
PORTSMOUTH, NH

# AGENDA

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## MONDAY, OCTOBER 21

State Association Host **Chris D'Elia**, *Vermont Bankers Association*

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11:45 am – 12:30 pm **BUFFET LUNCHEON**

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12:30 pm – 1:00 pm **OPENING SESSION**  
**Christopher D'Elia**, *Registrar*

Introduction

Philosophy of the School

Plans for the Session

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1:00 pm – 1:30 pm **INTRODUCTION TO BANKING & OTHER ISSUES**  
**Christopher D'Elia**, *Registrar*

History of Banking and Legislation

Forces Impacting the Industry

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1:30 pm – 2:30 pm **ROLE OF YOUR STATE BANKERS ASSOCIATION**  
**Christopher D'Elia**, *President, Vermont Bankers Association*

**Kristy Merrill**, *President, New Hampshire Bankers Association*

**Jim Roche**, *President, Maine Bankers Association*

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2:30 pm – 2:45 pm **REFRESHMENT BREAK**

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2:45 pm – 5:00 pm **BIRTH ORDER: WHAT'S IT GOT TO DO WITH  
BUSINESS ANYWAY?**

**THE ART OF MOTIVATING OURSELVES AND OTHERS**

**Jack Agati**, *Encouraging Concepts Associates*

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6:00 pm **BEER, WINE & CHEESE RECEPTION**

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6:30 pm **DINNER**

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### TUESDAY, OCTOBER 22

State Association Hostess **Kristy Merrill**, *New Hampshire Bankers Association*

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7:30 am – 8:15 am **BREAKFAST BUFFET**

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8:15 am – 9:45 am **ECONOMIC DEMOGRAPHICS**  
**Andrew Paolillo**, *VP, Director of Member Strategies & Solutions, FHLBB*

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9:45 am – 10:00 am **BREAK**

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10:00 am – 12:00 pm **FUNDAMENTALS OF LENDING**  
*(Includes Time for Case Study Analysis)*  
**Charlie Dowd**, *VP Residential Mortgage Sales, Meredith Village Savings*  
**Terrie McQuillen**, *SVP, Sr. Portfolio Manager, Merrimack County Savings Bank*  
**James Gallagher**, *SVP, Commercial Lending Officer, Merrimack County Savings*

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12:00 pm – 1:00 pm **LUNCH**

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1:00 pm – 2:30 pm **FRAUD, CYBERCRIME, SECURITY**  
**John H. Rogers**, *CISSP, Monarch Information Security Consultants*

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2:30 pm – 2:45 pm **REFRESHMENT BREAK**

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2:45 pm – 4:15 pm **BUSINESS DEVELOPMENT: ACQUIRING, RETAINING  
AND ATTRACTING CUSTOMERS**  
**Chantal Upton**, *Vice President, Market Manager, Partners Bank*

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4:15 pm – 4:30 pm **BREAK**

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4:30 pm – 5:45 pm **THE FUTURE OF TECHNOLOGY IN FINANCIAL  
SERVICES**  
**Matt Putvinski**, *CPA, CISA, CISSP, Wolf & Company, P.C.*

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6:30 pm **DINNER**

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7:30 pm **TEAM BUILDING/NETWORKING EXPERIENCE**  
Wear sneakers or comfortable walking shoes and have a jacket or sweater

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### WEDNESDAY, OCTOBER 23

State Association Host      **Chris D'Elia**, *Vermont Bankers Association*

7:30 am – 8:15 am      **BREAKFAST BUFFET**

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8:15 am – 10:15 am      **BANK FINANCIAL STATEMENTS/ROLE OF THE CFO**  
**Tom Zuke**, *Executive Vice President/ Chief Financial Officer & Treasurer*  
**Nate Cadorette**, *Vice President/Corporate Controller*  
*Kennebunk Savings Bank*

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10:15 am – 10:30 am      **BREAK**

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10:30 am – 11:45 am      **ASSET LIABILITY MANAGEMENT**  
**Tom Zuke**, *Executive Vice President/ Chief Financial Officer & Treasurer*  
**Nate Cadorette**, *Vice President/Corporate Controller*  
*Kennebunk Savings Bank*

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11:45 am – 12:30 pm      **LUNCH**

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12:30 pm – 2:00 pm      **MARKETING FOR THE FUTURE**  
**Linda Varrell**, *APR, Broadreach Public Relations*

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2:00 pm – 2:15 pm      **BREAK**

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2:15 pm – 3:15 pm      **INTRODUCTION TO TRUST SERVICES, WEALTH  
MANAGEMENT AND INSURANCE**  
**Jennifer Cook**, *Senior Vice President, Senior Trust Officer, Norway*  
*Savings Asset Management Group*

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3:15 pm – 3:30 pm      **REFRESHMENT BREAK**

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3:30 pm – 5:30 pm      **CEO PANEL DISCUSSION**  
**Steve deCastro**, *President & CEO, Gorham Savings Bank*  
**TBD**  
**Deb Stephenson**, *President & CEO, Brattleboro Savings & Loan*

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**DINNER ON YOUR OWN**

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## THURSDAY, OCTOBER 24

State Association Host **Jim Roche**, *Maine Bankers Association*

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7:30 am – 8:15 am **BREAKFAST BUFFET**

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8:15 am – 9:15 am **FROM SUPERVISOR TO LEADER**  
**David Ciullo**, *CEO, Career Management Associates*

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9:15 am – 9:30 am **BREAK**

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9:30 am – 10:45 am **FROM SUPERVISOR TO LEADER (continued)**  
**David Ciullo**, *CEO, Career Management Associates*

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10:45 am – 11:00 am **BREAK**

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11:00 am – 12:30 pm **FROM SUPERVISOR TO LEADER (continued)**  
**David Ciullo**, *CEO, Career Management Associates*

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12:30 pm – 1:30 pm **LUNCH**

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1:30 pm – 3:00 pm **HUMAN RESOURCES ISSUES IMPACTING MANAGERS**  
**Suzanne King**, *Partner, Pierce Atwood LLP*

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3:00 pm – 3:15 pm **REFRESHMENT BREAK**

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3:15 pm – 5:00 pm **ERM, CRA & COMPLIANCE**  
**Dean Stockford**, *President/CEO, M&M Consulting*

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6:00 pm **DINNER**

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### FRIDAY, OCTOBER 25

State Association Host      **Chris D'Elia**, *Vermont Bankers Association*

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7:30 am – 8:15 am      **BREAKFAST BUFFET**

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8:15 am – 10:15 am      **PUBLIC SPEAKING**  
**Dr. Cristy Beemer**, *Director of Composition, Professional & Technical Writing Coordinator, Associate Professor, University of New Hampshire*

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10:15 am – 10:30 am      **BREAK**

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10:30 am – 11:45 am      **WRITTEN COMMUNICATION SKILLS**  
**Dr. Cristy Beemer**, *Director of Composition, Professional & Technical Writing Coordinator, Associate Professor, University of New Hampshire*

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11:45 am      **ASSIGNMENTS AND WRAP UP**

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11:45 am      **BOX LUNCHES** (*take it for the road or relax and eat while you wait for the line at the valet to get shorter.*)

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