

# 2025 SPRING CEO/PRESIDENT/SENIOR MANAGEMENT MEETING

MAY 15-16, 2025 | RIVERWALK RESORT AT LOON MOUNTAIN, LINCOLN, NH

## AGENDA

### THURSDAY

May 15

12:00 PM

#### REGISTRATION

Special Amenity Sponsored by COCC

12:00 PM – 1:00 PM

#### LUNCH

Sponsored by M&M Consulting, LLC and Cobblestone Management, LLC

1:00 PM – 1:05 PM

#### WELCOME

Kristy Merrill, President & CEO

NH Bankers Association

1:05 PM – 2:00 PM

#### WASHINGTON UPDATE

Frank Pigulski, VP/Congressional Relations

American Bankers Association (ABA)

Frank will discuss how the ABA has a long history of working with members of both parties to develop common sense solutions to the challenges facing the banking industry. Hear what Congress is doing and how ABA is advocating for you.

2:00 PM – 3:00 PM

#### TOP BANK RISKS FOR 2025

John Hintze, Senior Correspondent, ABA Banking Journal

As a writer of banking issues for more than a decade, John will provide a high-level look at the risks banks are facing today. He will look at top risks including the regulatory impact of the new administration and uncertainty around interest rates.

3:00 PM – 3:15 PM

#### AFTERNOON BREAK

Sponsored by Agri-Access and IntraFi

3:15 PM – 4:15 PM

#### THE ENGAGED CEO: LEADING DURING CONSTANT CHANGE IN 2025

David Ciullo, CEO

Career Management Associates

This dynamic session equips CEOs with the tools to adapt to economic, technological, and workforce shifts, ensuring success in 2025 and beyond. Gain actionable insights on navigating the current human capital outlook for 2025. This includes fostering a purpose driven culture that enhances employee engagement and accountability, upskilling and reskilling initiatives needed with AI, and creating strategies that support workforce well-being. Explore the changing talent compliance landscape, including changes in DEI, affirmative action, leadership development innovations, shifting talent trends, and merit/skills-based hiring:

- Human Capital Outlook for 2025
- Embracing AI: How to Enhance Employee Productivity and Satisfaction
- Keeping Up with the rapid changes in Talent Compliance
- Creating and Ownership Mindset that fosters true Accountability
- CEO Well-Being – Starts with You!

# NH BANKERS ASSOCIATION | VT BANKERS ASSOCIATION

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4:15 PM – 5:00 PM

### CANADIAN – U.S. RELATIONS

**The Honorable Bernadette Jordan**, *Consul General of Canada in New England*

New Hampshire and Vermont have always viewed Canada as a key trading partner. Tariffs on imports from Canada are rattling global markets and prompting retaliatory trade measures that could harm American exporters. References to becoming a “51<sup>st</sup>” state are placing a strain on our historically close relationship. Join in a conversation about what this means to our states and the United States as a whole.

5:15 PM – 6:15 PM

### RECEPTION

**Sponsored by Independent Community Bankers of America (ICBA)**

6:15 PM – 8:00 PM

### DINNER

## FRIDAY

## MAY 16

7:30 AM – 8:00 AM

### BREAKFAST

**Sponsored by Berry Dunn and Goodwin Procter LLP**

8:00 AM – 9:00 AM

### MENTAL HEALTH IN THE WORKPLACE

**Shannon Prescott**, *CWCA, COSS, Director of Risk Control, The Richards Group*

More than ever employers are seeing the effects of mental health on their employees. Productivity, safety and attendance issues are just a few of the outcomes employers can face when an employee is struggling. In this session, attendees will review some new statistics around employee’s mental health and how that is now impacting our day-to-day work lives. Then, what you can do to help prevent issues before they begin. Everyone will receive a Mental Health Toolkit to take with them.

9:00 AM – 10:00 AM

### ECONOMIC UPDATE

**Dr. Jeffrey P. Thompson**, *VP & Economist, Federal Reserve of Boston Research Department*

10:00 AM – 10:15 AM

### BREAK

**Sponsored by Baker, Newman, Noyes and The NBS Group**

10:15 AM – 11:00 AM

### ROUNDTABLE DISCUSSION ON THE FUTURE OF BANKING

In the rapidly evolving financial landscape, banks are facing challenges that require them to adapt and innovate. Come prepared to discuss what you think the future of banking will look like and suggestions on how banks can work together to survive in the future.

11:00 AM – 12:00 PM

### CURRENT STATE OF CORE BANKING SYSTEMS (CBS)

**Tom Grottke**, *Managing Partner & CEO, The NBS Group, LLC*

The evolution of CBS in our industry is glacial but happening. Amazingly enough a new credit union CBS has converted well over 200 credit unions over the last six years, “sidecar” CBS have opened and are operating hundreds of digital “banks”, and two leading US providers have “modern” CBS that are in varying stages of deployment. So what is happening, who are potential viable options, what should my technology strategy be, and when is it time to modernize my CBS? These questions will be addressed as we navigate these uncertain waters!

12:00 PM

### CLOSING LUNCH

**Sponsored by Wolf and Company**