



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

MONDAY, OCTOBER 16-  
FRIDAY, OCTOBER 20, 2023

THE VENUE AT PORTWALK PLACE,  
PORTSMOUTH, NH

## AGENDA

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### MONDAY, OCTOBER 16

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 17

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**  
**Speaker, TBD**

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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      **MARKETING FOR THE FUTURE**  
**Linda Varrell**, *Broadreach Public Relations*

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4:15 pm – 4:30 pm      **BREAK**

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4:30 pm – 5:45 pm      **THE FUTURE OF 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 18

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 – 10:15 am

#### BANK FINANCIAL STATEMENTS/ROLE OF THE CFO

**Tom Zuke**, *Executive Vice President/ Chief Financial Officer & Treasurer  
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  
Kennebunk Savings Bank*

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11:45 am – 12:30 pm

#### LUNCH

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12:30 pm – 2:00 pm

#### BUSINESS DEVELOPMENT: ACQUIRING, RETAINING AND ATTRACTING CUSTOMERS

**Chantal Upton**, *Vice President, Market Manager, Partners Bank*

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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

**Kathy Austin**, *President & CEO, Community National Bank*

**Steve deCastro**, *President & CEO, Gorham Savings Bank*

**Joan Gile**, *President, Piscataqua Savings Bank*

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#### DINNER ON YOUR OWN

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### THURSDAY, OCTOBER 19

State Association Host

**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 – 9:15 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

**Anne Jenness**, *Attorney, Gallaher, Callahan & Gartrell, PC*

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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

**Daniel Eichorn**, *VP – Compliance & CRA Officer, Androscoggin Bank*

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6:00 pm

#### DINNER

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### FRIDAY, OCTOBER 20

State Association Host

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

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7:30 am – 8:30 am

#### BREAKFAST BUFFET

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8:30 am – 10:00 am

#### PUBLIC SPEAKING

**Dr. Cristy Beemer**, *Director of Composition, Professional & Technical Writing Coordinator, Associate Professor, University of New Hampshire*

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10:00 am – 10:15 am

#### BREAK

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10:15 am – 12:00 pm

#### WRITTEN COMMUNICATION SKILLS

**Dr. Cristy Beemer**, *Director of Composition, Professional & Technical Writing Coordinator, Associate Professor, University of New Hampshire*

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12:00 pm

#### ASSIGNMENTS AND WRAP UP

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12:00 pm

**BOX LUNCHES** (*take it for the road or eat while you wait for the line at the valet to get shorter!*)

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