

2018 FINTECH SYMPOSIUM

Conducted in partnership with: FHLB-SF & The Silicon Valley Center for Innovation



Goodwin

3 Embarcadero Center, 28th Floor, San Francisco, CA 94111

JULY 11, 2018 • 9:00 AM – 4:00 PM*

9:00 AM – 9:10 AM

Welcome & Introductions

Simone Lagomarsino & Greg Seibly

9:10 AM – 10:15 AM

Banking & Emerging Technologies: Defining Your Strategy

Robert Morgan • VP/Emerging Technologies, American Bankers Association

Emerging technologies are quickly changing the way financial institutions connect with their customers. Many banks have embraced innovation and continue to do so in order to gain efficiencies and better serve their customers. This presentation will provide an overview of how financial institutions are innovating today across the country. With a focus on community and mid-sized banks, this presentation is designed to help bankers define their strategy by reviewing those successful strategies that are currently employed by banks through third-party Fintech vendor relationships as well as by acquisition.

10:15 AM – 12:15 PM

Innovators Roundtable: Meet the Innovators

Curated by The Silicon Valley Center for Innovation
Companies: Q2 Funding Circle, Verafin & States Title

This roundtable presentation is composed of five different Fintech companies in various stages of market maturity (start-up to fully seasoned) outlining their products/services in a 20-minute format that includes a 10-minute presentation followed by a 10-minute Q&A session for each presentation.

12:15 AM – 1:30 PM

Innovators Luncheon

Bankers and Fintech presenters will continue the dialogue at on-site buffet lunch.

1:30 PM – 2:45 PM

Digital Banking Strategies for a Bank of the Future

Panel Moderator:
Michael Raneri, Sr.
Managing Director &
Fintech Advisory
Leader at PwC

There are many different digital growth strategies in the banking market, from incremental changes to modernizing without replacing the core ('wrap and digitize') to native digital bank strategies. This panel session will explore the different digital paths for banks, how they arrived at their strategy and how they are leveraging Fintech companies to build their 'Bank of the Future'. Our banker, Fintech, and PwC panelists will share how they are helping banks to deliver their digital strategies in a customer centric marketplace.

2:45 PM – 3:00 PM

Break

3:00 PM – 4:00 PM

Fintech Partnerships & Acquisitions: Negotiating Legal Problems to Find Practical Solutions

Panel Moderator:
Michael Flynn, Partner,
Financial Services Group,
Goodwin

Michael Flynn will moderate a panel of legal and industry experts to discuss best practices and as well as approaches for banks to resolve legal issues arising from Fintech partnerships and acquisitions.

4:00 PM

Conclusion

Simone Lagomarsino & Greg Seibly

*Note: An onsite cocktail reception hosted by Goodwin will immediately follow the conclusion of the program.