



Western Bankers Association
1303 J Street, Suite 600
Sacramento, CA 95814

Return Service Requested



2018
Women in Banking
FORUM

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FORUM

May 30-31, 2018

Paradise Point Resort & Spa
San Diego, California



2018 Women in Banking FORUM

Designed for women bankers—
junior officers to senior executives



Schedule At-A-Glance (Subject to change)

Up Your Game

From junior officers to executive level decision-makers, the **Women in Banking Forum** delivers the practical tools and tactical strategies necessary for today's accomplished professionals.

Women bankers from multiple levels will come together to explore the primacy of purpose in ways that are both inspiring and empowering.

Women in Banking Forum Advisory Committee

Amanda Avery
EVP & COO
Scott Valley Bank

Wendy Barbas
VP, Credit Officer
Boston Private Bank

Viviane Feilhaber
VP, Risk Business Management
MUFG Union Bank

Michelle Gil
Partner
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Janice Jafari
VP Operations Manager
American Business Bank

Nancy Lu
SVP, Sr Relationship Manager
Bank of America Merrill Lynch

Lisa Phillips
VP, Community Banking Sales Support Manager
US Bank

Jeri Reno
COO
Peoples Bank of Commerce

Anita Robinson

Nicole Sherman
SVP, Market Region Manager
Colombia Bank

Debbie Skinner
EVP & Chief Administrative Officer
F&M Bank, Lodi

Estella Sloan
Administrative Officer
Mission National Bank

Colleen Slocum
EVP, Director of HR
Seacoast Commerce Bank

Wednesday, May 30, 2018

▶ 4:00 p.m. – 6:00 p.m. **Welcome Cocktail Reception**

Network With Industry Professionals

Join us for cocktails and hors d'oeuvres on the Paradise Terrace, a lush outdoor space overlooking shimmering Mission Bay. Network with industry professionals while experiencing contemporary, California-cuisine before diving into the following day's inspirational and content-rich agenda.

Thursday, May 31, 2018

▶ 8:00 a.m. – 4:00 p.m. **Registration Open**

▶ 8:00 a.m. – 8:30 a.m. **Continental Breakfast**

▶ 8:30 a.m. – 8:45 a.m. **Icebreaker**

▶ 8:45 a.m. – 8:55 a.m. **Welcome and Introductions**

▶ 8:55 a.m. – 10:00 a.m. **Opening Keynote: Meridith Elliott Powell**

Four Strategies To Up Your Game

Success today requires a new set of skills and a different set of strategies to get ahead. The current marketplace and savvy clients demand more: relationship building, communication, and collaboration. In this high-powered keynote, attendees will leave feeling empowered, engaged with their intrinsic abilities, and ready to up their game!

▶ 10:00 a.m. – 10:30 a.m. **Refreshment Break and Book Signing with Meridith Elliott Powell**

▶ 10:30 a.m. – 11:30 a.m. **Stacey Garrett, Attorney, Keesal, Young & Logan, P.C.**

Adding Value in 2018: Privacy and Data Security in the Financial Services Industry

Women can demonstrate leadership in their organization at every level by being aware of and informed about emerging laws, regulations, and trends that affect the financial services industry. Gain a comprehensive understanding of privacy and data security while adding value to organizations, teams, and professional brands.



▶ 11:30 a.m. – 12:30 p.m. **Lunch and Pay It Forward Initiative**

Jess Ekstrom, Founder & CEO , Headbands of Hope

This year's charitable focus showcases Jess Ekstrom, founder and CEO of Headbands of Hope, an organization dedicated to making children feel confident and beautiful during medical hardships. For every item sold, a headband is donated to a child with cancer. During lunch, listen to Jess' story of hope, and how her organization is having a positive impact on every children's hospital in America and 15 countries. For more information, please visit www.headbandsofhope.com.

▶ 12:30 p.m. – 1:30 p.m. **Chris Petersen, Chief Revenue Officer, Q2**

Uncovering ROI: How Underutilized Human Capital Can Generate New Revenue

Current and emerging female leaders are a growing segment of the financial services industry; concurrently, younger generations are looking for forward-thinking organizations where they'll be able to build meaningful careers. Learn how to utilize human capital to its fullest, nurture talent, and bridge employee engagement with brand stewardship.

▶ 1:30 p.m. – 1:35 p.m. **Transition Break**

▶ 1:35 p.m. – 2:45 p.m. **Idea Exchange**

▶ 2:45 p.m. – 3:00 p.m. **Refreshment and Dessert Break**

▶ 3:00 p.m. - 4:00 p.m. **Emily Hollis, CEO, ALM First Financial Advisors**

Leaping Into Leadership

In the mid-1980s, Emily Hollis was a professional ballet dancer who went back to school to prepare herself for the finance world. Listen to the challenges Emily overcame to start her own financial advisory company and the skills it took to stand out and become successful in a male-dominated industry.

▶ 4:00 p.m. **Program Concludes**



Speaker Biographies

Meridith Elliott Powell

Keynote Speaker & Business Growth Expert

▶ **Session:** Up Your Game

Voted one of the top 15 growth experts to watch by Currency Fair, Meridith Elliott Powell is an award-winning author, keynote speaker, and business strategist. With a background in corporate sales and leadership, her career expands over several industries including banking, healthcare, and finance. Meridith worked her way up from an entry-level position to earn her seat at the C-suite table. She is a Certified Speaking Professional, a designation held by less than 12 percent of professional speakers, and she is a member of the prestigious Forbes Coaching Council. In her highly engaging keynote sessions, Meridith shows her audiences real-life strategies to attract more business, retain top talent, and leap into position to win in this new economy.



Stacey Garrett

Attorney, Garrett, Keesal, Young & Logan, P.C.

▶ **Session:** Adding Value in 2018: Privacy and Data Security in the Financial Services Industry

Stacey Garrett is a shareholder of Keesal, Young & Logan, P.C. For 26 years, she has successfully represented financial institutions and securities broker-dealers across the nation. Stacey also leads her firm's cybersecurity and privacy law practice. She is certified by the International Association of Privacy Professionals in the area of U.S. privacy law (CIPP/US) and European Union privacy and data protection law (CIPP/E). Stacey is admitted to practice before the U.S. Supreme Court and all states in California and Nevada and has been named a Southern California "Super Lawyer" by *Los Angeles Magazine* since 2005.



Chris Petersen

Chief Revenue Officer, Q2

- **Session:** Uncovering ROI: How Underutilized Human Capital Can Generate New Revenue

With more than 30 years of experience as a market leader building strategic partnerships with financial institutions, Chris Petersen brings a wealth of knowledge to her position as chief revenue officer of Q2. She began her career in financial technology sales and now demonstrates exceptional performance in all areas of sales and client management for emerging and groundbreaking technology solutions. She is focused on helping financial institutions identify new ways to connect with their communities, drive revenue, engage with customers, and create new strategic growth opportunities.



Emily Hollis

CEO, ALM First Financial Advisors

- **Session:** Leaping Into Leadership

Emily Hollis has served as a principal of ALM First Financial Advisors since the company was established in 1995. Under her leadership, the company has steadily grown to a client base of more than 250 financial institutions representing more than \$220 billion in assets. A well-known figure in the investment community and a renowned expert in asset liability management, Emily is a popular speaker at industry functions and is a recurring contributor to industry publications such as *Western Banker*.



Exhibitor, Sponsorship & Advertising Opportunities

If your firm is interested in having your name in front of 100+ banks, Western Bankers offers a wide variety of sponsorship opportunities. For exhibiting, sponsorship, and advertising, please contact Rosemary Mignano at rmignano@westernbankers.com or (916) 438-4435.

Registration Information

Registration Fees

Regular Registration Fees

► WBA Member Bank (before May 4, 2018)	\$395
► WBA Member Bank (after May 4, 2018)	\$595
► WBA Affiliate Member	\$795
► Non-Member Bank	\$795

Cancellation Policy

Substitutions are allowed at no additional cost. Written notice is required for all substitutions/cancellations. The full registration fee will be refunded if written notice is received by May 4, 2018, and 50 percent if by May 18. No refunds will be provided after May 18. Registrations made on or after May 18 are not subject to refund.

Discounts Available

Purchase a Table:

Reserve a table of eight bankers for almost half the regular event registration rate. Please contact Ellie Rovira for more information.

Group Pricing:

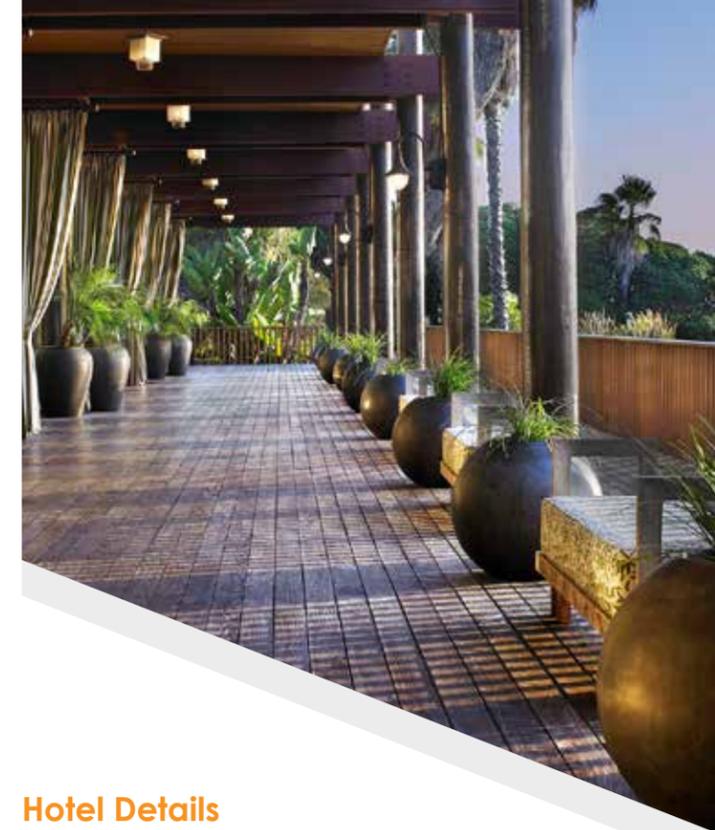
If you have three or more registrants from your bank, there is a discount of \$50 per person. Please use the code WOMEN18 when registering using the registration form. To take advantage of this discount, please fill out the registration form and send to Ellie Rovira.

NOTE: Discounts cannot be combined but can be used in conjunction with early-bird pricing.

Staff Contact

For more information about the Women in Banking Forum, please contact:

- **Ellie Rovira**
Erovira@westernbankers.com
(415) 352-3231



Hotel Details

Paradise Point Resort & Spa

1404 Vacation Road, San Diego, CA 92109
Phone: (858) 274-4630

The WIB room rate is \$199 per room per night plus taxes and other fees. Please make your reservations by April 23, 2018. Rooms are limited and may sell out before this date. Requests after this date will be accepted on a space-available basis at the hotel's prevailing rates.

Please visit www.calbankers.com/WB18 to reserve your room for the event or contact the hotel's reservations department at (800) 344-2626. In order to receive the special group guestroom rate, please mention that you are attending the 2018 Women in Banking Forum.

For more information
or to register, please visit
www.calbankers.com/WB18