

# SESSIONS

MONDAY 13 SEPTEMBER - 13/09/2021

FinovateFall

September 13-15, 2021  
The Marriott Marquis Times Square, New York  
Virtual only access also available

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## Registration & Networking

8:00am - 8:55am

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## Welcome From Finovate

8:55am - 9:00am

## Participants

**Greg Palmer** - Vice President, Finovate

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## Demo Session

9:00am - 10:20am

Finovate is known for spotlighting new fintech innovations from seed-stage start-ups to established leaders. Hand-selected companies have just 7 minutes to demo -- not pitch -- their services and solutions for the financial industry. That way, you see how the tech works and if it's the right fit for your organization. Demo categories could include:

- Payments
  - Lending
  - InsurTech
  - InvesTech
  - Blockchain
  - AI & Machine Learning
  - RegTech
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## Mastermind Keynote

10:20am - 10:35am

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## Networking Break

10:35am - 11:05am

Come & Meet The Demoing Companies In The Exhibition Hall

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## Analyst All Stars – How Financial Services Have Been Changed Forever

11:05am - 11:25am

Always one of the most popular sessions at Finovate. 3 leading fintech analysts take the stage for 7 minutes each to present the key opportunities for financial institutions and fintechs in a new financial services landscape. Expect expert analysis of what has changed; which new technologies have proved their worth and what's next in the new normal.

## Participants

**Sam Kilmer** - Senior Director, Cornerstone Advisers

**Alyson Clarke** - Principal Analyst, Forrester

**Tiffani Montez** - Senior Analyst, Aite-Novarica

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## Mastermind Keynote

11:25am - 11:40am

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## Demo Session

11:40am - 12:40pm

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- Payments
  - Lending
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  - Blockchain
  - AI & Machine Learning
  - RegTech
- 

## Lunch & Networking Break

12:40pm - 1:40pm

Come & Meet The Demoing Companies In The Exhibition Hall

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## Women In Fintech Power Panel: Paving The Way For The Next Generation Of Female Founders & Executives – How Can We Reach A Gender-Neutral Future In Financial Services?

1:40pm - 2:10pm

## Participants

**Moderator: Nicole Newlin** - Leadership Team, NYC Fintech Women

**Jillian Williams** - Partner, Cowboy Ventures

**Sarah Wolter** - Principal, FinTech Collective

**Pauline Roteta** - Co-Founder & CEO, Pasito

**Amea Parbhoo** - Managing Director, Accion Venture Lab

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## Mastermind Keynote

2:10pm - 2:25pm

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## Demo Session

2:25pm - 3:25pm

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  - InsurTech
  - InvesTech
  - Blockchain
  - AI & Machine Learning
  - RegTech
- 

## Networking Break

3:25pm - 3:55pm

Come & Meet The Demoing Companies In The Exhibition Hall

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## Mastermind Keynote

3:55pm - 4:10pm

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## Demo Session

4:10pm - 5:10pm

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## Cocktails, Networking & 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule

5:10pm - 5:15pm

These highly interactive sessions will allow you to engage directly with our speakers on some of the key issues facing the industry. To allow for free and open debate the sessions will be run under the Chatham House Rule. Under the Chatham House Rule, anyone who comes to a meeting is free to use information from the discussion, but is not allowed to reveal who made any comment.

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## The Synergistic Intersection Of Community Banks, Fintechs And SMEs In The New Normal

5:15pm - 6:15pm  
EXECUTIVE BOARDROOM 1

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### Participants

**Moderator: Charles Potts** - Senior Vice President, Chief Innovation Officer, Independent Community Bankers of America® (ICBA)

**Adam Goller** - EVP Head of Fintech Banking, Cross River Bank

**Kimberly Kirk** - Executive Vice President, Chief Operations Officer, Queensborough National Bank & Trust Co.

**Peter Hazlehurst** - Co-Founder & CEO, Synctera

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## How Financial Services Companies Can Play A Key Role Helping Clients On Their ESG & Climate Change Journeys

5:15pm - 6:15pm  
EXECUTIVE BOARDROOM 2

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### Participants

**Moderator: Greg Manko** - Founder & President, Manko Marketing

**Matthieu Soulé** - Head of C Lab Americas, BNP Paribas

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## What Next For Neobanks? How Much Of A Threat Are They Now To Incumbents?

5:15pm - 6:15pm  
EXECUTIVE BOARDROOM 3

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### Participants

**Moderator: Jesse Podell** - Director, Ally Ventures

**John Waupsh** - Chief Innovation Officer, Kasasa

**Stephanie Balint** - General Manager, N26

**Neil Kahrim** - Director of Growth & Operations, OakNorth

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## Financial Inclusion & Financial Wellness - Providing Your Customers With Holistic Long-Term Financial Health

5:15pm - 6:15pm  
EXECUTIVE BOARDROOM 4

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### Participants

**Moderator: Suman Bhattacharyya** - Technology Writer & Editor, Tearsheet

**Malia Lazu** - CEO & Founder, The Lazu Group (The Urban Labs)

**BC Silver** - CEO, ChangeFi

**Seth Goodall** - Executive Director, Corporate Social Responsibility, Santander Bank N.A.

**Jared Kaplan** - CEO, OppFi

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## Close of Day 1

6:15pm - 6:20pm

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<b>8:00AM</b>	8:00am - Registration & Networking 8:55am - Welcome From Finovate	8:00am - Registration & Networking 8:55am - Welcome From Finovate	8:00am - Registration & Networking 8:55am - Welcome From Finovate	8:00am - Registration & Networking 8:55am - Welcome From Finovate
<b>9:00AM</b>	9:00am - Demo Session	9:00am - Demo Session	9:00am - Demo Session	9:00am - Demo Session
<b>10:00AM</b>	10:20am - Mastermind Keynote 10:35am - Networking Break	10:20am - Mastermind Keynote 10:35am - Networking Break	10:20am - Mastermind Keynote 10:35am - Networking Break	10:20am - Mastermind Keynote 10:35am - Networking Break
<b>11:00AM</b>	11:05am - Analyst All Stars – How Financial Services Have Been Changed Forever 11:25am - Mastermind Keynote 11:40am - Demo Session	11:05am - Analyst All Stars – How Financial Services Have Been Changed Forever 11:25am - Mastermind Keynote 11:40am - Demo Session	11:05am - Analyst All Stars – How Financial Services Have Been Changed Forever 11:25am - Mastermind Keynote 11:40am - Demo Session	11:05am - Analyst All Stars – How Financial Services Have Been Changed Forever 11:25am - Mastermind Keynote 11:40am - Demo Session
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<b>1:00PM</b>	1:40pm - Women In Fintech Power Panel: Paving The Way For The Next Generation Of Female Founders & Executives – How Can We Reach A Gender-Neutral Future In Financial Services?	1:40pm - Women In Fintech Power Panel: Paving The Way For The Next Generation Of Female Founders & Executives – How Can We Reach A Gender-Neutral Future In Financial Services?	1:40pm - Women In Fintech Power Panel: Paving The Way For The Next Generation Of Female Founders & Executives – How Can We Reach A Gender-Neutral Future In Financial Services?	1:40pm - Women In Fintech Power Panel: Paving The Way For The Next Generation Of Female Founders & Executives – How Can We Reach A Gender-Neutral Future In Financial Services?
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<b>3:00PM</b>	3:25pm - Networking Break 3:55pm - Mastermind Keynote	3:25pm - Networking Break 3:55pm - Mastermind Keynote	3:25pm - Networking Break 3:55pm - Mastermind Keynote	3:25pm - Networking Break 3:55pm - Mastermind Keynote
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<b>5:00PM</b>	<p><b>5:10pm</b> - Cocktails, Networking &amp; 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule</p> <p><b>5:15pm</b> - The Synergistic Intersection Of Community Banks, Fintechs And SMEs In The New Normal</p>	<p><b>5:10pm</b> - Cocktails, Networking &amp; 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule</p> <p><b>5:15pm</b> - How Financial Services Companies Can Play A Key Role Helping Clients On Their ESG &amp; Climate Change Journeys</p>	<p><b>5:10pm</b> - Cocktails, Networking &amp; 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule</p> <p><b>5:15pm</b> - What Next For Neobanks? How Much Of A Threat Are They Now To Incumbents?</p>	<p><b>5:10pm</b> - Cocktails, Networking &amp; 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule</p> <p><b>5:15pm</b> - Financial Inclusion &amp; Financial Wellness - Providing Your Customers With Holistic Long-Term Financial Health</p>
<b>6:00PM</b>	<p><b>6:15pm</b> - Close of Day 1</p>	<p><b>6:15pm</b> - Close of Day 1</p>	<p><b>6:15pm</b> - Close of Day 1</p>	<p><b>6:15pm</b> - Close of Day 1</p>

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## Demo Session

9:00am - 10:20am

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  - InvesTech
  - Blockchain
  - AI & Machine Learning
  - RegTech
- 

## Mastermind Keynote

10:20am - 10:35am

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## Fireside Chat: The Platform Economy Is Coming - How Much Of A Threat Are The Tech Giants To Incumbents?

10:35am - 10:50am

## Participants

**Jeremy K. Balkin** - Managing Director, Global Head of FinTech and Innovation, J.P.Morgan

**Moderator: Maria Gotsch** - President and CEO, Partnership Fund for New York City

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## Networking Break

10:50am - 11:20am

Come & Meet The Demoing Companies In The Exhibition Hall

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## Mastermind Keynote

11:20am - 11:35am

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## Demo Session

11:35am - 12:35pm

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- Payments
  - Lending
  - InsurTech
  - InvesTech
  - Blockchain
  - AI & Machine Learning
  - RegTech
- 

## Lunch & Networking Break

12:35pm - 1:30pm

Come & Meet The Demoing Companies In The Exhibition Hall

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## Mastermind Keynote

1:30pm - 1:45pm

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## Demo Session

1:45pm - 2:45pm

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- Payments
  - Lending
  - InsurTech
  - InvesTech
  - Blockchain
  - AI & Machine Learning
  - RegTech
- 

## Networking Break

2:45pm - 3:15pm

Come & Meet The Demoing Companies In The Exhibition Hall

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## Mastermind Keynote

3:15pm - 3:30pm

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## Demo Session

3:30pm - 4:30pm

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  - Blockchain
  - AI & Machine Learning
  - RegTech
- 

## Fireside Chat: Why We Need Bold Leadership More Than Ever Before

4:30pm - 4:45pm

## Participants

**Luvleen Sidhu** - Chair, CEO & Founder, BM Technologies

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## Cocktails, Networking, Best In Show Announcement & 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule

4:45pm - 4:50pm

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## Harnessing New Tech To Improve Back Office Automation; To Boost Product Quality; To Drive Digital Transformation; To Improve CX & To Drive Down Costs

4:50pm - 5:50pm  
EXECUTIVE BOARDROOM 5

These highly interactive sessions will allow you to engage directly with our speakers on some of the key issues facing the industry. To allow for free and open debate the sessions will be run under the Chatham House Rule. Under the Chatham House Rule, anyone who comes to a meeting is free to use information from the discussion, but is not allowed to reveal who made any comment.

### Participants

**Moderator: Alex Johnson** - Director of Research, Cornerstone Advisers

**Jane Gavronsky** - Chief Technology Officer, Fintech Open Source Foundation (FINOS)

**Matthew Marolda** - Chief Innovation Officer, Acrisure

**Tamara Zaichkowsky** - Head of Restructuring Office, Santander Bank N.A.

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## How To Capture The Strategic Advantage Of Open Banking – What Are The Key Questions Around Cloud, Data & APIs?

4:50pm - 5:50pm  
EXECUTIVE BOARDROOM 7

These highly interactive sessions will allow you to engage directly with our speakers on some of the key issues facing the industry. To allow for free and open debate the sessions will be run under the Chatham House Rule. Under the Chatham House Rule, anyone who comes to a meeting is free to use information from the discussion, but is not allowed to reveal who made any comment.

### Participants

**Moderator: William Mills III** - Chief Executive Officer, William Mills Agency

**Nancy Mao** - SVP, Digital Solutions for Business, Treasury Management & Payment Solutions, Wells Fargo

**Andrew Steele** - Investor, Activant Capital

**Jenny Mustazza** - Executive Director, JPMorgan Chase

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## Combating Financial Crime

4:50pm - 5:50pm  
EXECUTIVE BOARDROOM 6

These highly interactive sessions will allow you to engage directly with our speakers on some of the key issues facing the industry. To allow for free and open debate the sessions will be run under the Chatham House Rule. Under the Chatham House Rule, anyone who comes to a meeting is free to use information from the discussion, but is not allowed to reveal who made any comment.

### Participants

**Moderator: Conan French** - Senior Advisor for Innovation and Fintech, Institute of International Finance (IIF)

**Jas Randhawa** - Head of Financial Crimes, Stripe

**Kevin Bhatt** - Managing Partner, Long Ridge Equity Partners

**Vita Boomstein** - Global Sanctions Officer, Popular Inc.

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## We Are Approaching The Single Biggest Wealth Transfer In History - How Can You Capture This Opportunity?

4:50pm - 5:50pm  
EXECUTIVE BOARDROOM 8

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### Participants

**Moderator: Justin Overdorff** - Partner, Lightspeed Venture Partners

**Tricia Haskins** - Vice President, Digital Strategy & Platform Consulting, Fidelity Investments

**Jemma Wolfe** - Global Co-Head of Strategy for Consumer and Wealth Management (CWM), Goldman Sachs

**Paul Knodel** - CEO and Managing Director, Raisin

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## Close of Day 2

5:50pm - 5:55pm

# SCHEDULE

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<b>8:00AM</b>	<b>8:30am</b> - Registration & Networking <b>8:55am</b> - Welcome From Finovate	<b>8:30am</b> - Registration & Networking <b>8:55am</b> - Welcome From Finovate	<b>8:30am</b> - Registration & Networking <b>8:55am</b> - Welcome From Finovate	<b>8:30am</b> - Registration & Networking <b>8:55am</b> - Welcome From Finovate
<b>9:00AM</b>	<b>9:00am</b> - Demo Session	<b>9:00am</b> - Demo Session	<b>9:00am</b> - Demo Session	<b>9:00am</b> - Demo Session
<b>10:00AM</b>	<b>10:20am</b> - Mastermind Keynote <b>10:35am</b> - Fireside Chat: The Platform Economy Is Coming - How Much Of A Threat Are The Tech Giants To Incumbents? <b>10:50am</b> - Networking Break	<b>10:20am</b> - Mastermind Keynote <b>10:35am</b> - Fireside Chat: The Platform Economy Is Coming - How Much Of A Threat Are The Tech Giants To Incumbents? <b>10:50am</b> - Networking Break	<b>10:20am</b> - Mastermind Keynote <b>10:35am</b> - Fireside Chat: The Platform Economy Is Coming - How Much Of A Threat Are The Tech Giants To Incumbents? <b>10:50am</b> - Networking Break	<b>10:20am</b> - Mastermind Keynote <b>10:35am</b> - Fireside Chat: The Platform Economy Is Coming - How Much Of A Threat Are The Tech Giants To Incumbents? <b>10:50am</b> - Networking Break
<b>11:00AM</b>	<b>11:20am</b> - Mastermind Keynote <b>11:35am</b> - Demo Session	<b>11:20am</b> - Mastermind Keynote <b>11:35am</b> - Demo Session	<b>11:20am</b> - Mastermind Keynote <b>11:35am</b> - Demo Session	<b>11:20am</b> - Mastermind Keynote <b>11:35am</b> - Demo Session
<b>12:00PM</b>	<b>12:35pm</b> - Lunch & Networking Break	<b>12:35pm</b> - Lunch & Networking Break	<b>12:35pm</b> - Lunch & Networking Break	<b>12:35pm</b> - Lunch & Networking Break
<b>1:00PM</b>	<b>1:30pm</b> - Mastermind Keynote <b>1:45pm</b> - Demo Session	<b>1:30pm</b> - Mastermind Keynote <b>1:45pm</b> - Demo Session	<b>1:30pm</b> - Mastermind Keynote <b>1:45pm</b> - Demo Session	<b>1:30pm</b> - Mastermind Keynote <b>1:45pm</b> - Demo Session
<b>2:00PM</b>	<b>2:45pm</b> - Networking Break	<b>2:45pm</b> - Networking Break	<b>2:45pm</b> - Networking Break	<b>2:45pm</b> - Networking Break
<b>3:00PM</b>	<b>3:15pm</b> - Mastermind Keynote <b>3:30pm</b> - Demo Session	<b>3:15pm</b> - Mastermind Keynote <b>3:30pm</b> - Demo Session	<b>3:15pm</b> - Mastermind Keynote <b>3:30pm</b> - Demo Session	<b>3:15pm</b> - Mastermind Keynote <b>3:30pm</b> - Demo Session

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4:00PM	<p><b>4:30pm</b> - Fireside Chat: Why We Need Bold Leadership More Than Ever Before</p> <p><b>4:45pm</b> - Cocktails, Networking, Best In Show Announcement &amp; 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule</p> <p><b>4:50pm</b> - Harnessing New Tech To Improve Back Office Automation; To Boost Product Quality; To Drive Digital Transformation; To Improve CX &amp; To Drive Down Costs</p>	<p><b>4:30pm</b> - Fireside Chat: Why We Need Bold Leadership More Than Ever Before</p> <p><b>4:45pm</b> - Cocktails, Networking, Best In Show Announcement &amp; 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule</p> <p><b>4:50pm</b> - Combating Financial Crime</p>	<p><b>4:30pm</b> - Fireside Chat: Why We Need Bold Leadership More Than Ever Before</p> <p><b>4:45pm</b> - Cocktails, Networking, Best In Show Announcement &amp; 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule</p> <p><b>4:50pm</b> - How To Capture The Strategic Advantage Of Open Banking – What Are The Key Questions Around Cloud, Data &amp; APIs?</p>	<p><b>4:30pm</b> - Fireside Chat: Why We Need Bold Leadership More Than Ever Before</p> <p><b>4:45pm</b> - Cocktails, Networking, Best In Show Announcement &amp; 4 Champagne Executive Boardroom Discussions Under The Chatham House Rule</p> <p><b>4:50pm</b> - We Are Approaching The Single Biggest Wealth Transfer In History - How Can You Capture This Opportunity?</p>
5:00PM	<p><b>5:50pm</b> - Close of Day 2</p>	<p><b>5:50pm</b> - Close of Day 2</p>	<p><b>5:50pm</b> - Close of Day 2</p>	<p><b>5:50pm</b> - Close of Day 2</p>



# SESSIONS

WEDNESDAY 15 SEPTEMBER - 15/09/2021

FinovateFall

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## Registration & Networking

8:15am - 8:45am

## Welcome From Finovate

8:45am - 8:50am

## Participants

**Greg Palmer** - Vice President, Finovate

## Keynote Address: How The Pandemic Accelerated Digital Transformation & What It Means For Your Culture, Your Business & Your Customers

8:50am - 9:05am

The financial crisis of 2008 drove extensive reform of the banking sector and a fintech boom. The pandemic has created an even worse crisis – can we expect to see even greater innovation than the innovations that came out of 2008 as a result? What will Covid mean in terms of new sectors; new customers; new opportunities; new partnerships and new competitors?

## Investor All Stars: Where Is The Smart Money Investing In Fintech? How Has Covid Affected Innovation & Start-up Activity? Will We See Further Transition From Traditional Venture Capital To Alternative Vehicles Like SPACs? Is The Fintech Market Due A Correction? Who Will Survive & Become The Next Generation Of Unicorns?

9:05am - 9:35am

## Participants

**Moderator: Robin Weiss** - Senior Technology Advisor, Board Member, Fidelity Investments

**Matt Harris** - Partner, Bain Capital Ventures

**Andrew Lee** - Principal, Antler

**Mike Vostrizansky** - Principal, FTV Capital

## Mastermind Keynote

9:35am - 9:50am

## Seven In Seven: 7 Expert Speakers Have Just 7 Minutes To Tackle Some Of The Most Critical Issues Facing Financial Institutions & Fintechs

9:50am - 10:40am

1. Covid Drove Digital Acceleration & The Increased Implementation Of Technologies Like Blockchain, AI & APIs: What Worked & What Didn't?
2. How Important Were Partnerships In The Huge Strides We've Made In Digital Transformation & What Role Will They Play Now?
3. Hybrid Finance: How Money Is Being Re-Networked Through New Technologies
4. Embedded Finance & Embedded Banking In A Fully Integrated Ecosystem
5. Caregivers and Financial Services: The Massive Customer Segment Hidden in Plain Sight
6. How Mobile Tech and Machine Learning are Transforming Payments
7. Financial Crime: How Can We Harness New Tech To Protect Ourselves & Our Customers?

## Participants

**Ben Cukier** - Partner, Centana Growth Partners

**Siri Borsum** - Global VP Finance Vertical Eco-Development & Partnership, Business Consumer Group, Huawei

**Trevor Marshall** - Chief Technology Officer, Current

**Rasha Katabi** - Founder & CEO, Brim Financial

**Joel Brightfield** - Principal, SixThirty

**Toby Russell** - Co-CEO, Shift

## Networking Break plus A Q&A Session With Our Keynote Digital Transformation Speaker

10:40am - 11:10am

## Fireside Chat: Harnessing Digital Transformation For Growth - Key Success Factors For Digital Sales & Digital Engagement

11:10am - 11:25am

## Mastermind Keynote

11:25am - 11:40am

## The Finovate Fringe - Five In Five: 5 Expert Speakers Have Just 5 Minutes To Bring You Up To Speed On Up & Coming Fintech

11:40am - 12:05pm

1. Can Fintech Power Healthcare Change?
2. Harnessing AI To Democratise Home Buying
3. Capturing The Opportunities Of The Cannabis Market
4. Decentralised Finance - An Emerging Alternative to the Global Financial System
5. Why RegTech Will Be The Next Big Thing

## Participants

**Ben Siverly** - Data Scientist, Lively

**Jess Kennedy** - Co-Founder, Beeline

**Bryan O'Connell** - Co-Founder & CEO, Huckleberry

**William Herkelrath** - Managing Director, Chainlink Labs

**Dara Tarkowski** - Managing Partner, Actuate Law

## Lunch & Networking Break

12:05pm - 1:05pm

## Opening Remarks From The Chair

1:05pm - 1:10pm  
FUTURE TECH

## Opening Remarks From The Chair

1:05pm - 1:10pm  
FUTURE PAYMENTS

## Fireside Chat: Bitcoin, Digital Currencies, Diem, Central Bank Digital Currencies & Blockchain – Are Digital Currencies & Blockchain Finally Gaining Traction With FIs?

1:10pm - 1:25pm  
FUTURE TECH

## Participants

**James Wallis** - VP of Central Bank Engagements, RippleX, Ripple

## Keynote Address: How Covid Has Transformed Global eCommerce & Omnichannel Payments. How Will True Mobile Wallets Evolve & Will They Be Able To Connect Internationally?

1:10pm - 1:25pm  
FUTURE PAYMENTS

## Keynote Address: Harnessing AI to Improve Efficiencies, Increase Margins and Prevent Fraud

1:25pm - 1:40pm  
FUTURE TECH

# SESSIONS

WEDNESDAY 15 SEPTEMBER - 15/09/2021

FinovateFall

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## Fireside Chat: The Need For Speed – Where Next With Faster Payments?

1:25pm - 1:40pm  
FUTURE PAYMENTS

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## Mastermind Keynote

1:40pm - 1:55pm  
FUTURE TECH

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## Mastermind Keynote

1:40pm - 1:55pm  
FUTURE PAYMENTS

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## Power Panel: The Conversational AI Market Is Expected To Reach A \$14 Billion Valuation By 2025 - How Can You Leverage It To Deliver ROI Driving CX?

1:55pm - 2:25pm  
FUTURE TECH

### Participants

**Moderator: Steven Ramirez** - CEO, Beyond the Arc

**Ben Maxim** - VP of Digital Strategy & Innovation, MSU Federal Credit Union

**Colin Boone** - Vice President Digital Experience, Royal Credit Union

**Natalie Luu** - Partner, Lightspeed Venture Partners

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## Power Panel: How Will New Technologies, New Competitors And New Business Models Shape The Future Of Payments? Is Payments Orchestration About To Have Its Moment?

1:55pm - 2:25pm  
FUTURE PAYMENTS

### Participants

**Moderator: Talie Baker** - Senior Analyst, Retail Banking & Payments, Aite Group

**Ron Oliveira** - US CEO, Revolut

**Jennifer Barker** - Head of Client Service & Implementations – Wholesale Payments, Corporate & Investment Bank, JPMorgan Chase & Co.

**Yasmin Ulrich** - Leadership Voyager | Treasury, Western Union

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## Networking Break

2:25pm - 2:55pm

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## Opening Remarks From The Chair

2:55pm - 3:00pm  
DIGITAL TRANSFORMATION

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## Opening Remarks From The Chair

2:55pm - 3:00pm  
SME & CONSUMER LENDING

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## Keynote Address: Customer Insights - Sharing Real Life Examples Of Best Practice In CX And How To Blend Human & Digital CX

3:00pm - 3:15pm  
DIGITAL TRANSFORMATION

### Participants

**Beth Johnson** - Chief Experience Officer, Citizens Financial Group

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## Keynote Address: PPP Loans - How Community Banks Rose To The Occasion & What Lessons Can We Learn From Their Success?

3:00pm - 3:15pm  
SME & CONSUMER LENDING

### Participants

**Jill Castilla** - President & CEO, Citizens Bank of Edmond

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## Keynote Address: Financial Services Digital Transformation: Embracing the Next Generation of Technology

3:15pm - 3:30pm  
DIGITAL TRANSFORMATION

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## Fireside Chat: Helping Small Businesses In Challenging Times For Accessing Liquidity & Credit - How Are FIs & Fintechs Helping?

3:15pm - 3:30pm  
SME & CONSUMER LENDING

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## Power Panel: How Open Innovation & Strategic Partnerships Can Help You On Your Digital Transformation Journey

3:30pm - 4:00pm  
DIGITAL TRANSFORMATION

### Participants

**Moderator: Mike Leonetti** - President & CEO, Association of Strategic Alliance Professionals (ASAP)

**Christina Giorgio** - President & CEO, ICBA Bancard

**Lisa Gold Schier** - Group Senior Vice President, American Bankers Association (ABA)

**Liz Guthrie** - Head of Innovation and Research & Development within the Strategy, Digital, and Innovation Group,, Wells Fargo

**John Curtis** - Vice President and General Manager, B2B Mobile, Samsung Electronics America

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## Power Panel: Lending 2.0 - What Are The Problems That Need To Be Solved For Consumers & SMEs In The New COVID 19 World?

3:30pm - 4:00pm  
SME & CONSUMER LENDING

### Participants

**Moderator: Dipanjan Das** - Senior Director; Head of Product X-Buy, SoFi

**Scott Stewart** - CEO, Innovative Lending Platform Association

**Jennifer Lee** - Principal, Edison Partners

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## Closing Remarks From Finovate

4:00pm - 4:05pm

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## Close of FinovateFall 2021

4:05pm - 4:10pm

# SCHEDULE

WEDNESDAY 15 SEPTEMBER - 15/09/2021

FinovateFall

September 13-15, 2021  
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TIME	DIGITAL TRANSFORMATION	FUTURE PAYMENTS	FUTURE TECH	SME & CONSUMER LENDING
<b>8:00AM</b>	<p><b>8:15am</b> - Registration &amp; Networking</p> <p><b>8:45am</b> - Welcome From Finovate</p> <p><b>8:50am</b> - Keynote Address: How The Pandemic Accelerated Digital Transformation &amp; What It Means For Your Culture, Your Business &amp; Your Customers</p>	<p><b>8:15am</b> - Registration &amp; Networking</p> <p><b>8:45am</b> - Welcome From Finovate</p> <p><b>8:50am</b> - Keynote Address: How The Pandemic Accelerated Digital Transformation &amp; What It Means For Your Culture, Your Business &amp; Your Customers</p>	<p><b>8:15am</b> - Registration &amp; Networking</p> <p><b>8:45am</b> - Welcome From Finovate</p> <p><b>8:50am</b> - Keynote Address: How The Pandemic Accelerated Digital Transformation &amp; What It Means For Your Culture, Your Business &amp; Your Customers</p>	<p><b>8:15am</b> - Registration &amp; Networking</p> <p><b>8:45am</b> - Welcome From Finovate</p> <p><b>8:50am</b> - Keynote Address: How The Pandemic Accelerated Digital Transformation &amp; What It Means For Your Culture, Your Business &amp; Your Customers</p>
<b>9:00AM</b>	<p><b>9:05am</b> - Investor All Stars: Where Is The Smart Money Investing In Fintech? How Has Covid Affected Innovation &amp; Start-up Activity? Will We See Further Transition From Traditional Venture Capital To Alternative Vehicles Like SPACs? Is The Fintech Market Due A Correction? Who Will Survive &amp; Become The Next Generation Of Unicorns?</p> <p><b>9:35am</b> - Mastermind Keynote</p> <p><b>9:50am</b> - Seven In Seven: 7 Expert Speakers Have Just 7 Minutes To Tackle Some Of The Most Critical Issues Facing Financial Institutions &amp; Fintechs</p>	<p><b>9:05am</b> - Investor All Stars: Where Is The Smart Money Investing In Fintech? How Has Covid Affected Innovation &amp; Start-up Activity? Will We See Further Transition From Traditional Venture Capital To Alternative Vehicles Like SPACs? Is The Fintech Market Due A Correction? Who Will Survive &amp; Become The Next Generation Of Unicorns?</p> <p><b>9:35am</b> - Mastermind Keynote</p> <p><b>9:50am</b> - Seven In Seven: 7 Expert Speakers Have Just 7 Minutes To Tackle Some Of The Most Critical Issues Facing Financial Institutions &amp; Fintechs</p>	<p><b>9:05am</b> - Investor All Stars: Where Is The Smart Money Investing In Fintech? How Has Covid Affected Innovation &amp; Start-up Activity? Will We See Further Transition From Traditional Venture Capital To Alternative Vehicles Like SPACs? Is The Fintech Market Due A Correction? Who Will Survive &amp; Become The Next Generation Of Unicorns?</p> <p><b>9:35am</b> - Mastermind Keynote</p> <p><b>9:50am</b> - Seven In Seven: 7 Expert Speakers Have Just 7 Minutes To Tackle Some Of The Most Critical Issues Facing Financial Institutions &amp; Fintechs</p>	<p><b>9:05am</b> - Investor All Stars: Where Is The Smart Money Investing In Fintech? How Has Covid Affected Innovation &amp; Start-up Activity? Will We See Further Transition From Traditional Venture Capital To Alternative Vehicles Like SPACs? Is The Fintech Market Due A Correction? Who Will Survive &amp; Become The Next Generation Of Unicorns?</p> <p><b>9:35am</b> - Mastermind Keynote</p> <p><b>9:50am</b> - Seven In Seven: 7 Expert Speakers Have Just 7 Minutes To Tackle Some Of The Most Critical Issues Facing Financial Institutions &amp; Fintechs</p>
<b>10:00AM</b>	<p><b>10:40am</b> - Networking Break plus A Q&amp;A Session With Our Keynote Digital Transformation Speaker</p>	<p><b>10:40am</b> - Networking Break plus A Q&amp;A Session With Our Keynote Digital Transformation Speaker</p>	<p><b>10:40am</b> - Networking Break plus A Q&amp;A Session With Our Keynote Digital Transformation Speaker</p>	<p><b>10:40am</b> - Networking Break plus A Q&amp;A Session With Our Keynote Digital Transformation Speaker</p>
<b>11:00AM</b>	<p><b>11:10am</b> - Fireside Chat: Harnessing Digital Transformation For Growth - Key Success Factors For Digital Sales &amp; Digital Engagement</p> <p><b>11:25am</b> - Mastermind Keynote</p> <p><b>11:40am</b> - The Finovate Fringe - Five In Five: 5 Expert Speakers Have Just 5 Minutes To Bring You Up To Speed On Up &amp; Coming Fintech</p>	<p><b>11:10am</b> - Fireside Chat: Harnessing Digital Transformation For Growth - Key Success Factors For Digital Sales &amp; Digital Engagement</p> <p><b>11:25am</b> - Mastermind Keynote</p> <p><b>11:40am</b> - The Finovate Fringe - Five In Five: 5 Expert Speakers Have Just 5 Minutes To Bring You Up To Speed On Up &amp; Coming Fintech</p>	<p><b>11:10am</b> - Fireside Chat: Harnessing Digital Transformation For Growth - Key Success Factors For Digital Sales &amp; Digital Engagement</p> <p><b>11:25am</b> - Mastermind Keynote</p> <p><b>11:40am</b> - The Finovate Fringe - Five In Five: 5 Expert Speakers Have Just 5 Minutes To Bring You Up To Speed On Up &amp; Coming Fintech</p>	<p><b>11:10am</b> - Fireside Chat: Harnessing Digital Transformation For Growth - Key Success Factors For Digital Sales &amp; Digital Engagement</p> <p><b>11:25am</b> - Mastermind Keynote</p> <p><b>11:40am</b> - The Finovate Fringe - Five In Five: 5 Expert Speakers Have Just 5 Minutes To Bring You Up To Speed On Up &amp; Coming Fintech</p>

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FinovateFall

September 13-15, 2021

The Marriott Marquis Times Square, New York  
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TIME	DIGITAL TRANSFORMATION	FUTURE PAYMENTS	FUTURE TECH	SME & CONSUMER LENDING
12:00PM	12:05pm - Lunch & Networking Break	12:05pm - Lunch & Networking Break	12:05pm - Lunch & Networking Break	12:05pm - Lunch & Networking Break
1:00PM		<p>1:05pm - Opening Remarks From The Chair</p> <p>1:10pm - Keynote Address: How Covid Has Transformed Global eCommerce &amp; Omnichannel Payments. How Will True Mobile Wallets Evolve &amp; Will They Be Able To Connect Internationally?</p> <p>1:25pm - Fireside Chat: The Need For Speed – Where Next With Faster Payments?</p> <p>1:40pm - Mastermind Keynote</p> <p>1:55pm - Power Panel: How Will New Technologies, New Competitors And New Business Models Shape The Future Of Payments? Is Payments Orchestration About To Have Its Moment?</p>	<p>1:05pm - Opening Remarks From The Chair</p> <p>1:10pm - Fireside Chat: Bitcoin, Digital Currencies, Diem, Central Bank Digital Currencies &amp; Blockchain – Are Digital Currencies &amp; Blockchain Finally Gaining Traction With FIs?</p> <p>1:25pm - Keynote Address: Harnessing AI to Improve Efficiencies, Increase Margins and Prevent Fraud</p> <p>1:40pm - Mastermind Keynote</p> <p>1:55pm - Power Panel: The Conversational AI Market Is Expected To Reach A \$14 Billion Valuation By 2025 - How Can You Leverage It To Deliver ROI Driving CX?</p>	
2:00PM	<p>2:25pm - Networking Break</p> <p>2:55pm - Opening Remarks From The Chair</p>	2:25pm - Networking Break	2:25pm - Networking Break	<p>2:25pm - Networking Break</p> <p>2:55pm - Opening Remarks From The Chair</p>
3:00PM	<p>3:00pm - Keynote Address: Customer Insights - Sharing Real Life Examples Of Best Practice In CX And How To Blend Human &amp; Digital CX</p> <p>3:15pm - Keynote Address: Financial Services Digital Transformation: Embracing the Next Generation of Technology</p> <p>3:30pm - Power Panel: How Open Innovation &amp; Strategic Partnerships Can Help You On Your Digital Transformation Journey</p>			<p>3:00pm - Keynote Address: PPP Loans - How Community Banks Rose To The Occasion &amp; What Lessons Can We Learn From Their Success?</p> <p>3:15pm - Fireside Chat: Helping Small Businesses In Challenging Times For Accessing Liquidity &amp; Credit - How Are FIs &amp; Fintechs Helping?</p> <p>3:30pm - Power Panel: Lending 2.0 - What Are The Problems That Need To Be Solved For Consumers &amp; SMEs In The New COVID 19 World?</p>

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FinovateFall

September 13-15, 2021

The Marriott Marquis Times Square, New York

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TIME	DIGITAL TRANSFORMATION	FUTURE PAYMENTS	FUTURE TECH	SME & CONSUMER LENDING
4:00PM	4:00pm - Closing Remarks From Finovate 4:05pm - Close of FinovateFall 2021	4:00pm - Closing Remarks From Finovate 4:05pm - Close of FinovateFall 2021	4:00pm - Closing Remarks From Finovate 4:05pm - Close of FinovateFall 2021	4:00pm - Closing Remarks From Finovate 4:05pm - Close of FinovateFall 2021