KLARIVIS EXECUTIVE DATA & INNOVATION SUMMIT
BUILDING A STRATEGIC EDGE WITH DATA

DAY ONE: FEBRUARY 10, 2025

4:00 PM Check in at The Hotel Roanoke (110 Shenandoah Ave NE, Roanoke, VA 24016)

5:00 PM – 7:30 PM Welcome Reception at The Hotel Roanoke

DAY TWO: FEBRUARY 11, 2025

6:30 AM – 8:00 AM Breakfast buffet available at The Hotel Roanoke – Compliments of KlariVis

8:00 AM Shuttle from The Hotel Roanoke to KlariVis Headquarters

8:15 AM – 8:45 AM Registration & Networking

8:45 AM – 9:00 AM Welcome & Introductions

9:00 AM – 9:45 AM Keynote Presentation - From Data to Intelligence: Harnessing AI to Transform Banking
Eddie Amos, Retired Corporate Officer and Vice President, GE Digital
The integration of artificial intelligence (AI) has emerged as a transformative force in the banking industry. Today, banks don't need to boil the ocean to see results. Instead, they can focus on specific, high-impact use cases to quickly extract value and build momentum for larger initiatives. This keynote will explore the powerful synergy between data and AI, offering actionable insights into how banks can harness this combination to drive innovation, enhance decision-making, and unlock new opportunities.

9:45 AM – 10:30 AM Driving Strategic Growth: How Data Transforms Banking Leadership
Jason Jones, President, Community Financial Services Bank
Jill Castilla, President/CEO, Citizens Bank of Edmond & ROGER Bank
Derek Williams, President/CEO, Century Bank
Moderator: Gill Hundley, Chief Operating & Risk Officer, KlariVis
Three distinguished bank leaders share their journey in leveraging data to drive strategic growth during this exclusive panel discussion. Hear firsthand why data became a top priority for their institutions, the pivotal reasons behind choosing KlariVis as their partner, and the transformative outcomes of a data-driven approach on their banks' growth, profitability, and operational excellence. This session offers invaluable insights into the decision-making processes of banking leaders and how data is reshaping the future of community banking.

10:30 AM – 10:45 AM Break

10:45 AM – 11:45 AM Breakout Sessions (select one)

- **Session A: KlariVis 101**
  Kim Snyder, CEO & Founder, KlariVis
  Chris Muracco, VP Client Experience, KlariVis
  Discover KlariVis in this exclusive session designed for those who want to learn more about the platform and see it in action. Explore the story behind KlariVis, enjoy a live demonstration, and gain insights into the seamless implementation process. Hear directly from a KlariVis client about their firsthand experience, including how the team's deep banking expertise made implementation effortless and impactful. Discover how KlariVis can transform your data into actionable insights with a partner that truly understands your industry.

- **Session B: Elevating Your KlariVis Experience**
  Gill Hundley, Chief Operating & Risk Officer, KlariVis
  Jerry Bradley, Chief Product Officer
  Ashley Fiore, Chief Business Intelligence Officer
  Join this exclusive session for existing KlariVis clients to engage directly with our client experience and product teams. Take a deep dive into the KlariVis product roadmap and gain insights into upcoming enhancements designed to support your strategic goals. This interactive session is your opportunity to ask questions, share feedback, and collaborate with the experts who are shaping the future of KlariVis. Let's work together to maximize the value and impact of KlariVis for your institution.

11:45 AM – 1:00 PM Networking Lunch

1:00 PM – 1:45 PM Beyond the Core: Using Data to Drive Growth and Performance
Jim Donnelly, President & CEO, Wayne Bank
Step into the story of transformation with a bank CEO who has revolutionized operations and growth by harnessing the power of KlariVis. In this engaging session, you'll hear real-world examples of how clear, actionable data has uncovered opportunities, celebrated top performers, and reduced dependence on legacy core systems. Take away practical strategies to ignite a data-driven culture, simplify processes, and achieve tangible results.

1:45 PM – 2:30 PM A New Frontier in Data Insights: KlariVis Transactional Intelligence
Jerry Bradley, Chief Product Officer, KlariVis
Ashley Fiore, Chief Business Intelligence Officer, KlariVis
Be among the first to discover the future of financial innovation with KlariVis' latest advancement, Transactional Intelligence. This session reveals how granular, transaction-level data can uncover hidden opportunities, spotlight customer behaviors, and drive smarter, faster decisions. Learn how this cutting-edge tool fits seamlessly into your strategy to elevate performance, amplify insights, and redefine what's possible for your institution.

2:30 PM – 2:45 PM Break

2:45 PM – 3:30 PM Why DIY? The Strategic Edge of Partnership
Trish Ferrick, President, FVCbank
Anthony Ranghelli, SVP & Chief Information Officer, Bank of Charles Town
Moderator: Kim Snyder, CEO & Founder, KlariVis
Get an inside look at why two visionary banks chose partnership over going it alone. In this session, leaders from FVCbank and Bank of Charles Town share their journey of investing in KlariVis alongside a suite of fintech solutions. Explore the critical build-vs-buy decision and discover how collaboration has fueled innovation, streamlined operations, and driven results. Whether you're charting a fintech path or reevaluating your strategy, this conversation offers practical insights to harness the power of partnerships for your institution's success.

3:30 PM – 4:15 PM Keynote Presentation - Bridging the Gap: Aligning Technology, Operations and Strategy
Jay Como, Global Head of Data Governance & Operations, T. Rowe Price
As the pace of change in community banking continues to accelerate, misalignment between technology teams and business units can derail even the most promising data and innovation initiatives. This session highlights strategies for fostering cross-functional collaboration that bridges silos and ensures technology, operations, and strategy work in harmony. Learn how to break down barriers, align priorities, and drive meaningful results for your organization.

4:15 PM – 5:15 PM Closing Remarks, Networking & Demo Opportunities

5:30 PM – 8:30 PM Cocktail Reception and Dinner at Table 50

8:30 PM Shuttle from Table 50 to The Hotel Roanoke

DAY THREE: FEBRUARY 12, 2025

6:30 AM – 10:30 AM Breakfast buffet available at The Hotel Roanoke – Compliments of KlariVis

11:00 AM Check out