

# KLARIVIS EXECUTIVE DATA & INNOVATION SUMMIT

## BUILDING A STRATEGIC EDGE WITH DATA

### DAY ONE: APRIL 3, 2025 LOCATION: AZTEC ROOM

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#### 3:00 PM – 3:15 PM Welcome & Opening Remarks

*Kim Snyder, CEO & Founder, KlariVis*

#### 3:15 PM – 5:00 PM Breakout Sessions (select one)

##### Session A: KlariVis 101

*Kim Snyder, CEO & Founder, KlariVis*

*Gill Hundley, Chief Operating & Risk Officer, 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, see the platform in action through 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

*Jerry Bradley, Chief Product Officer, KlariVis*

*Chris Muracco, VP Client Experience, KlariVis*

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.

#### 4:00 PM Check-in at the Arizona Biltmore, 2400 E. Missouri Avenue, Phoenix, AZ 85016

#### 5:00 PM – 7:30 PM Welcome Reception at The Spire Bar

Enjoy heavy hors d'oeuvres and specialty branded KlariVis cocktails.

### DAY TWO: APRIL 4, 2025 LOCATION: AZTEC ROOM

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#### 7:30 AM – 8:30 AM Breakfast & Networking at The Aztec Patio & Lawn

#### 8:30 AM – 8:45 AM Welcome

*Kim Snyder, CEO & Founder, KlariVis*

#### 9:00 AM – 10:00 AM Keynote Presentation - From Data to Intelligence: Harnessing AI to Transform Banking

*Renato Derraik, Chief Information and Digital Officer, Live Oak Bank*

The integration of artificial intelligence (AI) has emerged as a transformative force in banking. 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. Key to this discussion is the principle that "you don't have to boil the ocean" to see results. Derraik will share specific, high-impact use cases banks can implement to quickly extract value and build momentum for larger initiatives, as well as how to build a strong data foundation at your institution without overextending or overwhelming resources.

**10:00 AM – 11:00 AM Driving Strategic Growth: How Data Transforms Banking Leadership**

*Steve Poynot, President & Chief Operating Officer, Capital Bank*

*Mike Olson, President & CEO, Bank of Brodhead*

*Moderator: Gill Hundley, Chief Operating & Risk Officer, KlariVis*

Two 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.

**11:00 AM – 11:15 AM Break****11:15 AM – 11:45 AM Bridging the Gap: Aligning Technology, Operations, and Strategy**

*David Conne, Senior Vice President, BankOnIt*

In today's fast-paced environment, the disconnect between technology teams and business units often hinders the success of data and innovation projects. This session will focus on fostering cross-functional collaboration to ensure seamless alignment between technology, operations, and organizational strategy. Key takeaways include:

- Proven approaches to breaking down silos and fostering collaboration across departments.
- Techniques for aligning technological advancements with operational workflows and strategic goals.
- Real-world examples of how banks have successfully integrated technology into their broader organizational vision.

**11:45 AM – 1:00 PM Networking Lunch on The Aztec Patio****1:00 PM – 1:45 PM A New Frontier in Data Insights: KlariVis Transactional Intelligence**

*David Nohe, CEO, FinGoal*

*Casey Hill, CFO, Merchants & Marine Bank*

*Jerry Bradley, Chief Product Officer, KlariVis*

*Moderator: Gill Hundley, Chief Operating & Risk 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.

**1:45 PM – 2:30 PM The CFO's Playbook: How Bank CFOs Are Using Analytics to Drive Performance**

*Casey Hill, CFO, Merchants & Marine Bank*

*Sandie Schultz, CFO, UBank*

*Moderator: Kim Snyder, CEO & Founder, KlariVis*

As financial complexity and regulatory demands rise, CFOs must go beyond traditional management and use data analytics to drive profitability, manage risk, and optimize performance. Led by experienced bank CFOs, this session explores how advanced analytics is transforming financial strategy and decision-making. Gain expert insights on leveraging data for forward-looking strategies to navigate today's dynamic banking landscape with confidence.

**2:30 PM – 2:45 PM Break**

**2:45 PM – 3:30 PM Data-Driven Retail Banking: How Analytics is Shaping the Future**

*Toni Lucky, Chief Retail Officer, Legend Bank*

*Charles Robertson, EVP & Chief Retail Officer, Kitsap Bank*

*Moderator: Gill Hundley, Chief Operating & Risk Officer, KlariVis*

Retail banking is evolving, with data analytics driving the transformation. In this executive-led session, leaders will share how they leverage analytics to enhance customer relationships, streamline operations, and boost growth. Retail officers will gain practical strategies for better decision-making, improved engagement, and increased profitability. Through real-world success stories and actionable insights, attendees will learn how to maximize the power of data in daily operations.

**3:30 PM – 4:15 PM Keynote Presentation – The ROI of Data Innovation: Creating Long-Term Value**

*Lisa Shields, Founder and CEO, FISPAN*

As the financial landscape evolves, organizations face increasing pressure to demonstrate the return on investment (ROI) of their data initiatives. This session will explore how banks and financial institutions can strategically balance short-term profitability with long-term innovation. Attendees will gain insights into:

- Frameworks for measuring the tangible and intangible value of data-driven projects.
- Case studies showcasing successful data investments and their impact on growth, profitability, and risk mitigation.
- Practical strategies to prioritize initiatives that align with organizational goals and deliver sustainable competitive advantage.

**4:15 PM – 4:45 PM Q & A / Closing Remarks****4:45 PM – 5:15 PM Demo Stations & Networking****5:30 PM – 8:30 PM Dinner at McArthur's****DAY THREE: APRIL 5, 2025**

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**7:00 AM – 9:00 AM Enjoy breakfast at McArthur's before departing****11:00 AM Check-out**