

KLARIVIS EXECUTIVE DATA & INNOVATION SUMMIT

BUILDING A STRATEGIC EDGE WITH DATA

DAY ONE: MAY 1, 2025

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

Kim Snyder, CEO & Founder, KlariVis

3:15PM – 4:15PM Breakout Sessions:

- **Session A: KlariVis 101**

Kim Snyder, CEO & Founder, KlariVis

Gill Hundley, Chief Operating & Risk Officer, KlariVis

Beth Beale, EVP & CFO, Benchmark Community Bank

Discover KlariVis in this exclusive session designed for those new to the platform. Explore the story behind KlariVis, enjoy a live demonstration, and hear from a current client about the seamless implementation process. Learn how KlariVis transforms data into actionable insights with a partner that understands your industry.

- **Session B: Elevating Your KlariVis Experience**

Jerry Bradley, Chief Product Officer, KlariVis

Ashley Fiore, Chief Business Intelligence Officer, KlariVis

Andrew Snyder, Senior Client Success Manager, 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.

4:30 PM Transportation from KlariVis Headquarters to The Hotel Roanoke (110 Shenandoah Ave NE, Roanoke, VA 24016)

4:45 PM Hotel Check-in at The Hotel Roanoke

5:15 PM – 7:30 PM Welcome Reception at The Hotel Roanoke Garden Courtyard

DAY TWO: MAY 2, 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 (110 Franklin Road SW, Roanoke, VA 24011)

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

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

Kim Snyder, CEO & Founder, KlariVis

9:00 AM – 9:45 AM Keynote Presentation - The Future of Banking: Leveraging Data for Growth and Profitability

Juan Gorricho, Head, Executive Product Owner and Data Strategy, TD Bank

As the banking industry faces unprecedented shifts, data has emerged as a critical asset for driving growth and profitability. In this keynote address, Juan will delve into how banks can harness the power of data to unlock new revenue streams, enhance customer experiences, and optimize operations. Attendees will gain insights into the future of data-driven banking, including innovative strategies for data management, predictive analytics, and personalization. Learn how to transform your institution by leveraging data to make smarter decisions, foster innovation, and stay ahead in a competitive landscape.

9:45 AM – 10:30 AM Driving Strategic Growth: How Data Transforms Banking Leadership

Jason Jones, President, Community Financial Services Bank

Trish Ferrick, President, FVCbank

Abby Wendel, President & CEO, Landmark National 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 A New Frontier in Data Insights: KlariVis Transactional Intelligence

David Nohe, CEO, FinGoal

Abby Wendel, President & CEO, Landmark National 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.

11:45 AM – 1:00 PM Networking Lunch in the KlariVis Kafe'

1:00 PM – 1:45 PM Coffee with KlariVis: How Bank Leaders Start Their Morning with KlariVis

Beth Beale, EVP & CFO, Benchmark Community Bank

Jim Donnelly, President & CEO, Wayne Bank

Moderator: Kim Snyder, CEO & Founder, KlariVis

Ever wonder how high-performing bank leaders are using data in real time to drive action? In this session, two KlariVis clients will take you inside their daily routines to show exactly how they use the platform to kick off their day. From tracking loan growth and deposit trends to identifying pricing opportunities and spotting risk early—see how KlariVis becomes the lens through which they lead. Clients will walk through their go-to dashboards, key metrics they focus on, and how they use those insights to coach their teams, make smarter decisions, and stay ahead of the curve. It's a rare, behind-the-scenes look at KlariVis in action—where strategy meets execution before the coffee even cools.

1:45 PM – 2:30 PM Data Without Disruption: How KlariVis Powered a Seamless Bank Merger

Susan Hubble, CIO, Peoples Security Bank & Trust

Moderator: Kim Snyder, CEO & Founder, KlariVis

Mergers are complex. Data shouldn't make them harder. In this session, one bank leader shares her real-world experience using KlariVis to navigate the challenges of a merger. Learn how her and her team leveraged KlariVis to align teams, standardize reporting, and gain immediate visibility into the combined institution—without waiting months for core conversion or custom reports. Hear how having a single source of truth before, during, and after the merger helped her team move faster, make better decisions, and maintain strong performance through the transition. Whether your institution is exploring growth through acquisition or simply wants to be merger-ready, this is a conversation you won't want to miss.

2:30 PM – 2:45 PM Break

2:45 PM – 3:30 PM The CFO's Playbook: How Bank CFOs Are Using Analytics to Drive Performance

Beth Beale, EVP & CFO, Benchmark Community Bank

Courtney Sacchetti, EVP & CFO, Bankwell

Moderator: Jerry Bradley, Chief Product Officer

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.

3:30PM – 4:00PM Roundtable Discussion - Getting Buy-In Across the Bank: Building a Culture of Data Engagement

The most powerful data platform in the world won't drive results if no one uses it. This roundtable dives into the real-world challenge of building a data-driven culture—one where every team, from the front line to the back office, understands and acts on the same insights. Join fellow bank leaders for a candid, peer-led conversation about what it really takes to create organization-wide engagement around data. We'll explore questions like:

- How are banks encouraging adoption beyond the executive team?
- What strategies are working to drive accountability at the branch and department level?
- How can data be used to create alignment across silos and functions?
- What does "success" look like when your whole organization is leaning into the numbers?

This is your chance to share lessons learned, hear what's working for others, and walk away with new ideas to strengthen your own data culture.

4:00 PM – 4:45 PM 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.

4:45 PM – 5:30 PM Closing Remarks, Networking & Demo Opportunities

5:45 PM – 8:30 PM Cocktail Reception and Dinner at Table 50

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

DAY THREE: MAY 3, 2025

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

11:00 AM Check out