

2018 Financial Forum Speaker and Session Lineup

Time	8:30 – 9:20	9:30 – 10:20	10:40 – 11:30			11:40 – 12:30	1:30 – 2:20	2:40 – 3:30	3:40 – 4:30
Topic	The Intersection of Financial Services Technology Innovation and Regulation	Cryptocurrency and its impact on financial services and the world	Baltimore, Maryland Regional Development: Three Perspectives			Keeping it Under wraps: PII: Personally Identifiable information	On Demand Banking using APIs: Application Programming Interface	Optimizing Payments for Efficiency, Risk and Incentives	LinkedIn for the Risk Averse Finance Professional
Speaker	Laura McGortey	Andrew Ostashen	Christine A. Ross CCE, MBA, MS	Bill Cole, IV	Amy Calvert	Will Robinson	Steven Shafer, III, CTP, AAP	Neal Herring, CTP	Laurel Egan Kenny, MSCM, MBA
Title	Managing Director, Business Development	Founder & CEO	President & CEO	President & CEO	Senior Vice President of Convention Sales and Services	Assistant Vice President, Information Security Officer & Data Privacy Officer	Senior Vice President Treasury Management Sales Consultant	Senior Payments Advisor	President & CEO
Co.	BNY Mellon	Vulsec	Maryland Chamber of Commerce	Baltimore Development Corporation	Visit Baltimore	Federal Reserve Bank of Richmond	Wells Fargo Treasury Merchant & Payment Solutions	Vizant	Turningpoint Communications
Web	BNYMellon.com	vulsec.com	mdchamber.org	baltimoredevelopment.com	Baltimore.org	richmondfed.org	Wellsfargo.com	Vizant.com	Turningpointcommunications.com
Twitter	@BNYMellon	@vulsecllc	@mdchamber	@BDCBaltimore	@BmoreMD @BaltimoreMD	@RichmondFed	@Wellsfargo	@Vizant	@turningpointcom
Bio	Laura McGortey is the managing director for Business Development with a regional focus on North America and a global specialization on payments. As such, she is responsible for the development and implementation of Treasury Services growth strategies in partnership with BNY Mellon's sales, product, and Markets teams. Since 1996, Laura served as the global head of high value, indirect clearing and foreign exchange payments within the Treasury Services Global Payments Product Management team. Over her career, Laura has taken leadership roles in several internal and / or client facing development projects spanning technology, innovation, product management, risk, compliance, and client onboarding. The most significant of these endeavors included the leadership, product definition and implementation of a new global payments platform within BNY Mellon, supporting cash and payment processing globally for all BNY Mellon business lines. Previously, Laura was Director of Materials Management and Distribution for a hospital, responsible for managing and directing procurement planning, purchasing and invoice processing. Laura holds a bachelor's degree from LaRoche College and an MBA from the University of Pittsburgh.	Andrew is the CEO at Vulsec, graduated from Rochester Institute of Technology majoring in Information Security and Forensics. Andrew has assessed over 250 companies including hospitals, banks, casinos to quantify their risks. He has been in the cryptocurrency field conducting research and trading since the inception of Bitcoin.	Christine A. Ross joined the Maryland Chamber as president and CEO in July 2016. Ross previously served as CEO of the Bonita Springs Area Chamber, transforming the organization and winning five-star accreditation from the U.S. Chamber of Commerce. She advocated for regulatory changes to improve the region's competitive business climate, and worked to ensure quality workforce and education reform, progressive infrastructure planning for transportation, and technology. Ross also led a wide range of economic development activities. She was voted Chamber Executive of the Year and her Chamber was recognized as Florida's Chamber of the Year in 2014, the same year she earned her elite Certified Chamber Executive status. Before Bonita Springs, Ross led MA chambers. Ross earned an MBA and a master's in marketing from the University of Maryland and a bachelor's degree in music education from James Madison University in VA.	William H. Cole is President and CEO of the Baltimore Development Corporation. Prior to his appointment at BDC, Cole was the Associate Vice President of Institutional Advancement at the University of Baltimore for more than a decade and was elected to the Baltimore City Council in 2007 and 2011. His public service also includes a term as a Member of the Maryland House of Delegates from 1998 to 2002 and as a Special Assistant to U.S. Representative Elijah E. Cummings from 1996 to 2003. Cole is also active on more than a dozen civic and non-profit boards: the Baltimore Hotel Corporation, the Downtown Partnership, Visit Baltimore, and the Waterfront Partnership. He also chaired the Steering Committee for the Opportunity Collaborative: Regional Plan for Sustainable Development. He earned a B.A. in Government & Politics from the University of Maryland College Park, and M.A. in Legal and Ethical Studies from the University of Baltimore. Cole has lived in his native Baltimore for 30 years.	Amy Calvert is Senior Vice President of Sales & Services for Visit Baltimore. Since joining the organization in 2009, I've made it my mission to strengthen our partnerships with key industry stakeholders and boost Charm City's appeal and visibility in key market segments. Amy understands the impact of keeping Baltimore's hotels occupied and its convention centers booked. As a key member of the executive leadership team, Amy contributes to the promotional, business development, and operational management strategies of the organization. She develops / directs the promotional strategies that are implemented by our sales and services team, and collaborate with them to ensure that we properly implement these programs in order to position Baltimore as a major tourist and meeting-planning destination. As spokesperson for Visit Baltimore, it is her job to ensure that Visit Baltimore is building the essential relationships between our local hospitality service providers, businesses, community leaders, and tourism partners to keep people coming back year after year.	Will Robinson is the Assistant Vice President, Information Security Officer (ISO) and Data Privacy Officer (DPO) for the Federal Reserve Bank of Richmond. In this capacity, he works to mitigate information security and privacy risk, manage compliance and policy, and enhance employee awareness. Before joining the Bank, he held IT risk management positions with General Electric. Will earned his bachelor's degree in history and French from Hampden-Sydney College and his M.B.A. from the University of Richmond.	Steven Shafer is a treasury management sales consultant covering the Piedmont Triad region of North Carolina. He provides industry guidance to Wells Fargo commercial banking, technology, media, financial institution and healthcare clients. His background includes: domestic and international treasury management, sales, treasury management, treasury operations, ERP integration, revenue cycle enhancement, business process management, and small business management. He has over 20 years' experience in process management and consulting in both the public and private sector. Steven holds a BA in Theatre Arts from Brigham Young University and an MBA from Appalachian State University. He is an AFP Certified Treasury Professional, and an Accredited ACH Professional.	Neal Herring, Treasury and Financial Operations Advisor at Vizant delivers value to clients in the form of cost reduction and operational efficiency. He graduated from Penn State in 2013 with a Bachelor's Degrees in Finance and Economics. After graduation, he worked at JPMorgan as a Financial Controller for EMEA Exotic products. Neal transitioned to Barclays in 2015 to manage their USD Intraday Liquidity. While there, using innovative and analytical strategies, he managed to reduce millions in costs to Barclays.	Laurel Egan Kenny, MBA, MSCM, is Founder and President of Turningpoint Communications. Laurel helps her clients to sell themselves as experts, sell solutions to their customers' business challenges and to sell value propositions. Laurel founded Turningpoint in 2007 after 13 years' building and leading marketing and business development teams for two large, global Fortune 100 financial services firms in wealth and treasury management divisions. Laurel serves on the Dallas AFP and is leading the digital transformation of TEXPO 2018. She is a multi-year, award-winning AFP Regional Officer and was past president and officer of the New England AFP. Laurel supports organizational strategy, marketing, membership and sponsorship for the Detroit TMA and MAAFP. Laurel presents nationally on cash and treasury management related topics, as well as on Marketing and business. She holds three degrees: MBA, MSCM and BA from Simmons College, Boston.
Session Info	The Financial Services industry is in the midst of a significant period of innovation and modernization. During this session we will take a look at some of these advances in the context of client expectations and the regulatory environment.	Cryptocurrency is disrupting the financial services space and the world! There are risks and reward associated with its usage and adoption. The speaker will provide an update on cryptocurrency's evolution, current and future states, including usage, blockchain operating systems, cultural acceptance, and rapid rise to adoption despite its untraditional, uncollateralized or documented realities.	We are excited to kick off this year's Financial Forum with a comprehensive and multi-perspective discussion about the Baltimore regional economy and community development plan from the President of the Maryland Chamber of Commerce, the head of the Baltimore economic development corporation and a senior leader at "Visit Baltimore". The discussion will include a discussion of the region (including demographics, education levels, housing trends) and the region's areas of influence, why Baltimore is attractive for new and existing Businesses, a discussion of the leading and shrinking industries, hot areas of development, infrastructure to support business development, areas of public / private partnership.			We've all heard the abbreviation: TMI. How much is too much PII? Personally Identifiable Information is everywhere. In our interconnected world and the internet of things, PII is being gathered and retained by businesses from Verizon to Google and Amazon. It doesn't belong to them. It's the property of the person who is identified by it. There should be restrictions placed on the types of information they retain, how long they retain it, and the manner in which it may be retained and how it will be used or disseminated directly or indirectly. The speaker will address PII, sectoral approaches and regulations, risks and recourse.	An application programming interface (API) is a set of clearly defined methods of communication between various software components. A good API makes it easier to develop a computer program by providing all the building blocks, which are then put together by the programmer. The presenter will address APIs and how to use them in the treasury and payments space, as well as on-demand banking. Additionally, he will walk through four areas of opportunity for APIs and review a Case study.	The rise in electronic payments is to be expected – payments are paper to electronic to virtual. What are the benefits associated with electronic and virtual payments – a discussion of the total cost which extends across the entire payment cycle puts it into perspective. Blockchain will be discussed relative to processing payment data. Total cost of entire payment cycle is discussed How to optimize the payment solution by factoring cost, efficiency, risk and incentives New technology (blockchain) and its potential impact on the payments cycle.	Financial professionals are, by and large, risk averse. Engaging in social media for personal and professional reasons may be intimidating at best - and outlawed at worst. As social media evolves, so has concerns for separation of personal and professional information, reputation risk and privacy. A career TM marketing leader, our speaker has a unique perspective on the many positive applications for social media, i.e. promoting brand, thought leadership, or getting a new job. Laurel will use her best persuasion techniques to get audience members up and running – and more proficient with LinkedIn!