

Sawyers & Jacobs LLC  
and  
Barret School of Banking  
present

# Bank Technology Summit 2010

*October 18 & 19, 2010*  
Christian Brothers University  
*Memphis, Tennessee*



## ***The Strategic Technology Planning Event for Bankers***



***Win an Apple iPad®***



**SAWYERS & JACOBS LLC**

## Program Introduction

**“The game of life is a lot like football. You have to tackle your problems, block your fears, and score your points when you get the opportunity.”**

**- Lewis Grizzard**

Problems and fears have abounded in banking over the past two years. As football season kicks off, it's time for bankers to score some points and seize opportunities. To help, we present **Bank Technology Summit 2010**, an exclusive event designed to offer bankers a strategic roadmap for the effective use of technology. Here is a sampling of recent questions from bankers:

- ***What are the latest tech trends we should include in our strategic technology plan?***
- ***How can we help our online banking business customers battle hackers and stop man-in-the-middle attacks?***
- ***Do we need cyber-liability insurance and what is covered?***
- ***How can we use technology to improve customer service?***
- ***What are the best methods for Security Awareness?***
- ***How can we assess Enterprise Risk?***
- ***Is our bank up-to-speed with the competition?***
- ***Are there new sources of revenue available using technology?***
- ***How can community banks maintain the payments franchise?***
- ***How does Financial Services Reform impact my bank and our technology planning?***

Bankers who have attended past Bank Technology Summits can attest to the value of the information and the immediate and positive impact on their banks. Many previous participants have now implemented **online account opening, remote deposit, mobile banking, customer reward programs, smartphone apps, social media sites, network security solutions, and stronger strategic technology plans**, just to name a few winning strategies and tactics from our past events.

Interact with the leading tech providers in our industry. Win prizes. Meet and network with bankers facing the same technology challenges.

Please register today to secure your spot. Seating will be limited to this exclusive event.

**Help your bank tackle, block, and score by attending Bank Technology Summit 2010.**



## Day One – Monday, October 18th

8:15 AM Registration Opens

8:15 AM - 9:00 AM Registration and Continental Breakfast

9:00 AM - 9:15 AM Welcome and Introductions

9:15 AM - 10:15 AM

**Getting Your Bank's Mojo Back Using Technology**

Jimmy Sawyers, Sawyers & Jacobs LLC

10:15 AM - 10:30 AM Networking and Refreshment Break – Sponsored by

10:30 AM - 11:30 AM

**Advances in Continuous Security Monitoring from the Perimeter to the Core**

Danny Johnston, Group President – Gladiator Technology (a division of ProfitStars)

Matt Riley, Chief Information Officer – Gladiator Technology (a division of ProfitStars)

11:30 AM - 1:00PM Luncheon in the Exhibit Hall and Networking with Exhibitors

**Luncheon Address – How Financial Services Reform Impacts Your Bank**

Philip Smith, Partner, Gerrish, McCreary & Smith

1:00 PM - 2:00 PM

**10 Ways to Get Your Technology Engine Humming**

Joshua Jacobs, Sawyers & Jacobs LLC

2:00 PM - 2:15 PM Networking and Refreshment Break

2:15 PM - 3:15 PM

**Secure Browsing: Protecting Online Customers**

Bo Chriscoe, Trusteer

3:15 PM – 3:30 PM Networking and Refreshment Break

4:00 PM - 5:00 PM **Marketing 2.0: Leveraging Surf, Search, and Social to Enhance Your Online Reach**

Eric Cook, WSI

5:00 PM - 6:00 PM Networking Reception in the Exhibit Hall

## Day Two – Tuesday, October 19th

8:30 AM - 9:30 AM

**Cyber Liability and Data Breach Insurance: Do I Need It and What is Covered?**

Janet Smith, Bailey Special Risks, Inc.

9:30 AM - 9:45 AM Networking and Refreshment Break

9:45 AM - 10:45 AM

**High-Tech Relationship Banking**

Kevin B. Anderson, 360 View

10:45 AM - 11:00 AM Networking and Refreshment Break

11:00 AM - Noon

**The Way Up: Trends, Techs, and Tactics for the New Era**

Lee Wetherington, ProfitStars

Noon - 12:15 PM Prizes, Giveaways, Closing Remarks

Jimmy Sawyers, Sawyers & Jacobs LLC



## Participating Exhibitors, Speakers, and Sponsors (in alphabetical order, as of August 24, 2010)

- **360 View**
- **Bailey Special Risks, Inc.**
- **BancIntranets**
- **Barret School of Banking**
- **Christian Brothers University**
- **Fi-Data**
- **Fiserv**
- **Gerrish McCreary Smith**
- **Gladiator Technology**
- **inBusiness Services, Inc.**
- **Jack Henry/ProfitStars**
- **Sawyers & Jacobs LLC**
- **Trusteer**
- **WSI**

Interact with exhibitors. Network with speakers. Meet your fellow bankers. Explore our exhibit hall to discover exciting technology and some very nice people serving the banking industry. Be sure to enjoy our reception on the evening of Monday, October 18<sup>th</sup>.

### Audience

CIOs, CTOs, COOs, CEOs, IT and operations personnel, compliance officers, network administrators, security practitioners, auditors, examiners, technology evangelists, and anyone else interested in the strategic application of bank technology.

### Program Materials

Each participant will receive a conference catalogue which will include slide handouts and other useful materials.

### Attire

Business casual. Bring a sweater or a jacket should the room be cool.

### Meals

Breakfast will be provided both days as part of the event fees. Lunch will be provided on day one. Refreshment breaks are scheduled each morning and each afternoon. Day one will include a reception in the exhibit hall and a Banker VIP Event at FIRM NAME headquarters that evening.

### About the Barret School of Banking



The Paul W. Barret, Jr. School of Banking is a non-profit independent school created by and governed by a Board of Regents, whose members are executives from banks and other firms involved with the financial services industry. The mission of the School is to provide an adult learning experience for the career-oriented individual in commercial banking or a related financial services industry business. Visit [www.barret.ws](http://www.barret.ws) or email us at [barret@barret.ws](mailto:barret@barret.ws) to learn more.

### About Sawyers & Jacobs LLC



**Sawyers & Jacobs LLC** is a consulting firm focused on serving financial institutions. Our mission is **to help our clients use technology securely, effectively, and profitably to better serve their customers, comply with laws and regulations, contain costs, and compete.** We help banks in the areas of Technology Planning, Risk Management, Network Solutions, Risk Assessments, and Business Continuity & Disaster Recovery. Visit [www.sawyersjacobs.com](http://www.sawyersjacobs.com) to learn more about our firm, our services, and our people.

### Continuing Professional Education (CPE) Credits



#### CPE Credits

Paul W. Barret, Jr. School of Banking is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: [www.nasba.org](http://www.nasba.org).

The Barret School of Banking offering of *Bank Technology Summit* is a "group-live" advanced level program for bankers and other financial professionals. No advanced preparation or other prerequisites are required for enrollment. Admission guidelines are stated on the application. For more information regarding administrative policies such as complaint or refund, please contact the School office at 901-321-4000. Participants will receive 9 hours of Continuing Professional Education (CPE) credit for this program.



## Location

### Christian Brothers University

650 East Parkway South • Memphis, TN 38104  
• Phone (901) 321-4000 • Fax (901) 321-4099



[Christian Brothers University](#) is renowned and respected for its distinctive, vibrant, and vigorous educational programs. This small, friendly, and remarkably diverse campus in central Memphis helps students develop ethical values even as it prepares them to step up, stand out, and lead in professional careers.

Regularly rated one of the best universities in the South, CBU traces its roots to a 17th-century educational innovator, Saint John Baptist de La Salle. While strongly rooted in the 21st century, education at CBU honors those Lasallian traditions -- especially in the focus on faith, service, and community.

Source: [www.cbu.edu](http://www.cbu.edu)

*Note: During our event, it will be Fall Break at CBU so we'll have the entire campus to ourselves.*

## Lodging



A block of rooms will be available at a discounted rate at the all-suite hotel, [Holiday Inn Hotel-University of Memphis](#), 3700 Central Avenue, Memphis, TN 38111. To book a room, call 901.678.8200 and ask the booking agent for the **Barret School of Banking** discounted rate which should be **\$112** per night. Or, simply click on the links [here](#) and reserve online.

[The Holiday Inn Hotel University of Memphis](#) is an all-suite hotel centrally located in the heart of Memphis and easily accessible to downtown, the airport, and shopping. This hotel is a six-time TorchBearer Winner and features a beautifully decorated atrium, Medallion Restaurant, Central Grill, Medallion Lounge, and fitness center. Adjacent to the University of Memphis Fogelman Executive Conference Center, the hotel is located 2.7 miles from Christian Brothers University and eight miles from the airport, this hotel is convenient to restaurants, shopping, and area attractions. A complimentary shuttle will be available for trips within a three-mile radius of the hotel.

## Hotel Reservations

Please make your reservations by contacting the hotel directly. Reservations can be made by calling 901.678.8200. A block of rooms have been reserved with a group rate of **\$112** + tax per night. The rooms are being held under the Sawyers & Jacobs name. The early deadline for making hotel reservations at the group rate is **September 17, 2010**. When the allotted room block is sold, room rates will return to standard prices on a space-available basis, even if it is before the **September 17, 2010** deadline.

Once an individual reservation has been made, any changes should be made directly with the Group Reservations Department. A credit card number or one night's advance deposit will be required to secure a room out of this block. Cancellations must be received 24 hours prior to arrival or one night room and tax will be assessed.

## Registration

| Early Registration (on or before September 30, 2010) | Fees  |
|--|-------|
| First person   | \$400 |
| Second person (from the same bank)                   | \$350 |
| Third person (from the same bank)                    | FREE  |
| Registration (after September 30, 2010)              |       |
| First person   | \$500 |
| Second person (from the same bank)                   | \$450 |
| Third person (from the same bank)                    | FREE  |
| Registration (at the door)                           |       |
| First person   | \$600 |
| Second person (from the same bank)                   | \$550 |
| Third person (from the same bank)                    | FREE  |

*Fees include event materials, refreshment breaks, breakfast, lunch and reception on day one, and exhibit hall. Fees do not include hotel or transportation.*

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|--|--|
| <h3>5 Easy Ways to Register</h3> <p><b>EMAIL</b>    <a href="mailto:kmcneish@sawyersjacobs.com">kmcneish@sawyersjacobs.com</a></p> <p><b>FAX</b>        <b>(866) 488-4933</b></p> <p><b>PHONE</b>    <b>(901) 485-0434</b></p> <p><b>MAIL</b>        Sawyers &amp; Jacobs LLC, LLC<br/>Attn: Kristin McNeish<br/>1085 Halle Park Circle, Suite 101<br/>Collierville, TN 38017</p> <p><b>ONLINE</b>    <a href="http://www.sawyersjacobs.com">www.sawyersjacobs.com</a></p> | <h3>Please check one:</h3> <p>_____ <b>First Registration</b></p> <p>_____ <b>Second Registration</b></p> <p>_____ <b>Third Registration</b></p> <p>Note: To take advantage of multiple attendee discounts, all participants must be from the same bank. Please note additional registrants on your completed registration form.</p> |
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Name Title

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Email

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Bank/Company

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Phone/Fax

[ ] Check Enclosed: Make checks payable to **Sawyers & Jacobs LLC**

**Early registration for the conference ends September 30, 2010, so make plans to register soon.** Questions? Contact Kristin McNeish (kmcneish@sawyersjacobs.com) at Sawyers & Jacobs LLC, LLC at 901.485.0434 or Chris Kelley (ckelley@barret.ws) at the Barret School of Banking at 901.321.4000.

