

Northwest Summit for Financial Professionals

~Conference Agenda~

Wednesday May 14, 2014

Optional Off-site Tours

- 10:00am Best of Portland – Walking Tour (10:00am – 12:30pm)
- 10:30am Tour Port of Portland (10:30am – 1:00pm)

Conference Events

- 5:00pm Networking Event & Social – *Sponsored by Bank of America* (5:00pm – 7:00pm) [Renaissance](#)

Thursday May 15, 2014

Conference Events

- 7:00am Registration – [KeyBank Grand Foyer](#)
- 7:00am Breakfast – *Sponsored by Union Bank* [Grand Ballroom](#)
- 8:15am Conference Opening Remarks [Grand Ballroom](#)
- 8:15am General Session I, “Q&A with GlobeSherpa CEO Nat Parker” [Grand Ballroom](#)
- 9:15am Networking Break [Library](#)
- 9:30am General Session II, “Corporate Debt: Rising Issuance & Implications” – *Sponsored by Vantiv* [Grand Ballroom](#)
- 10:30am Networking Break – [Library](#)
- 10:45am Concurrent Session I – *Sponsored by Invesco*
 - A. “Are you ready to go paperless?” [Renaissance](#)
 - B. “Framework for Implementing Enterprise Risk Management” [Card](#)
 - C. “Tales from the Cryptocurrency – An Overview of Digital Currency” [Billiard](#)
 - D. “CTP Training: Financial Risk Management” [Fireside](#)
- 11:45pm Lunch & General Session III, “Cultural Intelligence: Effective Tools for the Global Workforce” – *Sponsored by HomeStreet Bank* [Grand Ballroom](#)
- 1:30pm Networking Break [Library](#)
- 1:45pm Concurrent Session II – *Sponsored by Invesco*
 - A. “Social Networking: Build Relationships and Secure Sales” [Billiard](#)
 - B. “Update on Money Market Funds - Still Popular Despite Low Yields and Ongoing Reform” [Card](#)
 - C. “Accounts Receivables - Finding the lost treasure.” [Renaissance](#)
 - D. “CTP Training: Financial Planning and Analysis” [Fireside](#)
- 2:45pm Networking Break – *Sponsored by Fidelity Investments* [Library](#)
- 3:00pm Concurrent Session III – *Sponsored by Invesco*
 - A. “Are you gambling with your Mobile Remote Deposit Capture?” [Billiard](#)
 - B. “How to Understand Bank Risk” [Card](#)
 - C. “Liquidity Management: Beyond Quantitative Easing” [Renaissance](#)
 - D. “CTP Training: Short-term Investing and Financial Decisions” [Fireside](#)
- 4:00pm Exhibition Hall Open [Library](#)
- 5:00pm Experience Grand Networking at Grand Central Bowl – *Sponsored by Opus Bank*

Friday May 16, 2014

Conference Events

- 7:45am Breakfast – *Sponsored by Umpqua* [Grand Ballroom](#)
- 8:15am General Session IV, “Yesterday, Today and Tomorrow – A Current View on the Economy and Financial Markets” – *Sponsored by AscendantFX* [Grand Ballroom](#)
- 9:30am Networking Break [Library](#)
- 9:45am General Session V, “FBI’s take on Current Trends in Cyber Security” [Grand Ballroom](#)
- 10:45am Networking Break [Library](#)
- 11:00am Concurrent Session IV – *Sponsored by Invesco*
 - A. “Humility: Its Relevance to Leadership and the Latest Research” [Card](#)
 - B. “PCI Compliance with Trustwave” [Chamber](#)
 - C. “SWIFT for Corporates: Win-win Strategies for Corporates and Banks” [Billiard](#)
 - D. “The Power of Card Programs” [Renaissance](#)
- 12:00pm Lunch & General Session VI, “THINK FORWARD: Why tomorrow’s world will be different than the one you think you know.” – *Sponsored by State Street Global Advisors* [Grand Ballroom](#)
- 1:30pm Concluding Conference Remarks, Acknowledgements and 2015 Announcements [Grand Ballroom](#)
- 2:00pm Conference Concludes

To obtain an electronic copy of a speaker’s presentation
please view the link under the agenda item at www.northwestsummit.org after June 1, 2014.