

FINANCIAL LEADERS FORUM

Thursday, November 20, 2025 • 9:00 am - 2:00 pm
The Park Avenue Club, Florham Park, NJ

AGENDA

3 CLE, 4 CPE, 4 CERP, 2 CRCM, 1 CTFA & 1 CFMP Credits Apply

- 9:00 am – 9:30 am** **Registration and Breakfast**
- 9:30 am – 9:35 am** **Welcome**
- 9:35 am – 10:25 am** **Economic Outlook**
Matt Colyar, Assistant Director – Economist II, Moody’s Analytics
- 10:25 am – 11:15 am** **How to Prepare your Capital for Loan Growth in the Trump Economy**
Adam Mustafa, President & CEO, Invictus Group
- There is momentum building that banks can get back to focusing on growing loans again for the first time in several years after dealing with the implications of the pandemic and a higher interest rate environment. In preparation for this potential new lending wave, smart banks are allocating capital well in advance to create maximum return to shareholders without stepping over any regulatory land mines. This presentation will focus on three specific techniques these banks are using to accomplish this.*
- 11:15 am – 11:30 am** **Networking Break**
- 11:30 am – 12:20 pm** **How to Approach AI at your Bank**
Audrey Magennis, Director, Cherry Bekaert
- Designed for banking leaders and decision-makers, we will guide you through the essential steps to develop and implement a successful AI strategy tailored to your institution. You will learn how to assess your bank’s readiness, set clear objectives, and initiate pilot projects that align with your business goals. We will also address key challenges such as data management, regulatory compliance, and organizational change, providing strategies to overcome these hurdles. Join us to gain actionable insights and prepare your bank to thrive in the AI-driven future.*
- 12:20 pm – 1:10 pm** **CFO’s Role In Innovation**
Brandon M. Quiterio, Senior Manager, Assurance, CPA, MSA, Wolf & Company

The need for financial institutions to embrace technology and innovation has become increasingly apparent over the past several years. In order for financial institutions to achieve their strategic goals, the need to examine existing technology providers, customer experience, and access to data is critical. With mounting pressure in the form of increased competition from large banks, fintech providers, and community institutions with advanced digital capabilities, the time to innovate is now. This presentation examines the CFO’s role in innovation, including current opportunities with automation, new fintech providers, and workflow analysis to support digital investment.

1:10 pm – 2:00 pm **Networking Lunch**