



A Stifel Company

KEEFE, BRUYETTE & WOODS

WINTER FINANCIAL SERVICES SYMPOSIUM

BOCA RATON, FL · FEBRUARY 13 & 14, 2020

Wednesday, February 12

7:00 PM	Welcome BBQ
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Thursday, February 13

7:00 AM	Registration & Breakfast
7:50 AM	Opening Remarks – Thomas Michaud, President & CEO, KBW
8:00 AM	Small Group Meetings only at this time
8:40 AM	Small Group Meetings only at this time
Presentations & Panels	
9:20 AM	Flexibility in Payouts & Receivables Moderator: Paul Friday, Managing Director, Fintech, KBW Panelists: Autobooks.co, CheckAlt, Finexio
9:55 AM	Coffee & Networking Break
10:10 AM	New Lending Platforms Moderator: Paul Friday, Managing Director, Fintech, KBW Panelists: Bankpoint, Lending Front, Loan Street & Zest
10:50 AM	Card Issuance, POS & Payfac Moderator: Paul Friday, Managing Director, Fintech, KBW Panelists: Corserv, Payroc, Rippleshot & Toast
11:30 AM	Citizens Financial Group Inc (CFG) Michael Ruttledge, Head of Technology Services
12:05 PM	Networking Lunch Buffet
1:10 PM	Bank of America (BAC) Aron Levine, Head of Consumer Banking & Investments & Sharon Miller, Head of Small Business
1:50 PM	New Technologies Around the Core Moderator: Paul Friday, Managing Director, Fintech, KBW Panelists: Kasasa, Mantl, Neocova & Nymbus
2:30 PM	KBW Bank Quality Index: Incorporating Quantitative Analysis into Bank Stock Analysis Moderator: Fred Cannon, Global Director of Research, KBW KBW Analysts: Collyn Gilbert, Brian Klock & Catherine Mealar
3:10 PM	KBW Bank Analysts: What We Learned in Boca Moderator: Chris McGratty, KBW KBW Analysts: Jacque Bohlen, Damon Delmonte, Brady Gailey, Kelly Motta & Mike Perito
3:50 PM	Small Group Meetings only at this time
4:30 PM	Small Group Meetings only at this time
7:00 PM	“Miami Vice” Cocktails & Buffet Dinner

*Presentations and meetings will run for 35 minutes followed by a 5 minute changeover.



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COMPANIES HOSTING 1x1 MEETINGS ON THURSDAY, FEBRUARY 13:

1st Source Corporation – SRCE
Affiliated Managers Group – AMG
Apollo Global Management – APO
Associated Banc-Corp – ASB
Atlantic Union Bankshares Corporation – AUB
Axos Financial, Inc. – AX
Banc of California, Inc. – BANC
BancorpSouth, Inc. – BXS
Bank of America – BAC
Bank OZK – OZK
Banner Corporation – BANR
Berkshire Hills Bancorp, Inc. – BHLB
BOK Financial Corporation – BOKF
Boston Private Financial Holdings, Inc. – BPFH
Brookline Bancorp, Inc. – BRKL
Bryn Mawr Bank Corporation – BMTC
Cadence Bancorporation – CADE
Cathay General Bancorp – CATY
Cboe Global Markets Inc. – CBOE
CenterState Bank Corporation – CSFL
Citizens Financial Group Inc – CFG
CME Group Inc – CME
Cohen & Steers, Inc. – CNS
Columbia Banking System, Inc. – COLB
Commerce Bancshares, Inc. – CBSH
Community Bank System, Inc. – CBU
Cowen Inc. – COWN
Cullen/Frost Bankers, Inc. – CFR
Customers Bancorp, Inc. – CUBI
CVB Financial Corp – CVBF
E*TRADE Financial Corporation – ETFC
Eagle Bancorp, Inc. – EGBN
East West Bancorp – EWBC
Enterprise Financial Services Corp – EFSC
Evercore Inc – EVR
FB Financial Corporation – FBK
First Bancorp – FBNC
First BanCorp. – FBP
First Busey Corporation – BUSE

First Defiance Financial Corp. / United Community Financial Corp – FDEF/UCFC
First Financial Bancorp. – FFBC
First Financial Bancshares, Inc. – FFIN
First Hawaiian, Inc. – FHB
First Interstate Bancsystem, Inc. – FIBK
First Merchants Corporation – FRME
First Midwest Bancorp, Inc. – FMBI
Flagstar Bancorp, Inc. – FBC
Fulton Financial Corporation – FULT
Glacier Bancorp, Inc. – GBCI
Great Western Bancorp, Inc. – GWB
Greenhill & Co., Inc. – GHL
Hancock Whitney Corporation – HWC
Hanmi Financial Corporation – HAFK
Home Bancshares, Inc. – HOMB
Hope Bancorp, Inc. – HOPE
Houlihan Lokey, Inc. – HLI
Huntington Bancshares Incorporated – HBAN
Independent Bank Corp. – INDB
Independent Bank Group – IBTX
Intercontinental Exchange Inc – ICE
Investors Bancorp, Inc. – ISBC
Lakeland Financial Corporation – LKFN
Lazard Ltd – LAZ
MarketAxess Holdings Inc. – MKTX
Meta Financial – CASH
Moelis & Co. – MC
National Bank Holdings Corporation – NBHC
NBT Bancorp, Inc. – NBTB
New York Community Bancorp, Inc. – NYCB
Northwest Bancshares, Inc. – NWBI
OceanFirst Financial Corp. – OCFC
OFG Bancorp – OFG

Old National Bancorp – ONB
Pacific Premier Bancorp, Inc. – PPBI
PacWest Bancorp – PACW
People's United Financial, Inc. – PBCT
Pinnacle Financial Partners, Inc. – PNFP
Popular, Inc. – BPOP
Prosperity Bancshares, Inc. – PB
Provident Bank – PFS
Renasant Corporation – RNST
S&T Bancorp, Inc. – STBA
Sandy Spring Bancorp, Inc. – SASR
Simmons First National Corporation – SFNC
South State Corporation – SSB
Southside Bancshares, Inc. – SBSI
Sterling Bancorp – STL
Stifel Financial Corp. – SF
Stock Yards Bancorp, Inc. – SYBT
Synovus Financial Corp – SNV
TCF Financial Corporation – TCF
Texas Capital Bancshares, Inc. – TCBI
Textainer - TGH
TowneBank – TOWN
TriCo Bancshares – TCBK
TriState Capital Bank – TSC
Trustmark Corporation – TRMK
UMB Financial Corporation – UMBF
Umpqua Holdings Corporation – UMPQ
United Bankshares, Inc. – UBSI
United Community Banks, Inc. – UCBI
Valley National Bancorp – VLY
Veritex Holdings, Inc. – VBTX
WaFd Bank – WAFD
Webster Financial Corporation – WBS
WesBanco, Inc. – WSBC
Western Alliance Bancorporation – WAL
Wintrust Financial Corporation – WTFC
WSFS Financial Corporation – WSFS

WIFI Network: KBWCONF
WIFI Password: KBW2020



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Friday, February 14

7:00 AM	Registration & Breakfast
8:00 AM	<i>Small Group Meetings only at this time</i>
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10:50 AM	<i>Small Group Meetings only at this time</i>
11:30 AM	<i>Small Group Meetings only at this time</i>
12:05 PM	Closing Networking Lunch Buffet

COMPANIES HOSTING 1x1 MEETINGS ON FRIDAY, FEBRUARY 14:

1st Source Corporation – SRCE
 Associated Banc-Corp – ASB
 Atlantic Union Bankshares Corporation – AUB
 Axos Financial, Inc. – AX
 Banc of California, Inc. – BANC
 Banner Corporation – BANR
 Berkshire Hills Bancorp, Inc. – BHLB
 BOK Financial Corporation – BOKF
 Brookline Bancorp, Inc. – BRKL
 Cadence Bancorporation – CADE
 Columbia Banking System, Inc. – COLB
 Commerce Bancshares, Inc. – CBSH
 Customers Bancorp, Inc. – CUBI
 Eagle Bancorp, Inc. – EGBN
 Enterprise Financial Services Corp – EFSC
 FB Financial Corp – FBK
 First Bancorp – FBNC
 First Commonwealth Financial Corporation – FCF

First Financial Bancshares, Inc. – FFIN
 First Horizon National Corporation / IBERIABANK Corporation – FHN/IBKC
 First Interstate BancSystem, Inc. – FIBK
 First Merchants Corporation – FRME
 Flagstar Bancorp, Inc. – FBC
 Great Western Bancorp, Inc. – GWB
 Home Bancshares, Inc. – HOMB
 Hope Bancorp, Inc. – HOPE
 KKR & Co – KKR
 Lakeland Financial Corporation – LKFN
 MarketAxess Holdings Inc. – MKTX
 NBT Bancorp Inc. – NBTB
 New York Community Bancorp, Inc. – NYCB
 Northwest Bancshares, Inc. – NWBI
 Old National Bancorp – ONB
 Pinnacle Financial Partners, Inc. – PNFP

Provident Financial Services, Inc. – PFS
 Renasant Corporation – RNST
 Sandy Spring Bancorp, Inc. – SASR
 Simmons First National Corporation – SFNC
 Sterling Bancorp – STL
 Stifel Financial Corp. – SF
 Synovus Financial Corp – SNV
 TCF Financial Corporation – TCF
 Textainer – TGH
 TowneBank – TOWN
 TriCo Bancshares – TCBK
 TriState Capital Holdings, Inc. – TSC
 UMB Financial Corporation – UMBF
 Veritex Holdings, Inc. – VBTX
 WaFd Bank – WAFD
 Webster Financial Corporation – WBS
 Wesbanco Inc. – WSBC

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