With Operation 411, compliance isn’t a 911.

BOLD

INNOVATION

CHANGES

ALL.

In the next few years, financial institutions will face mandatory changes to the self-service channel. Diebold is responding now, with Operation 411: 4 compliance requirements, from 1 company with 1 request. With Diebold as a proactive partner, you’ll be efficiently ahead of change to meet everything from Windows® 7 updates to PCI compliance. Operation 411. It’s another example of how Diebold never stops watching the future, as it helps you now.

For the entire story, visit www.diebold.com/411.

requests@diebold.com  www.diebold.com

VISIT US AT BOOTH #211.
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Join the Conversation
#TechMecca
TechMecca General Information

REGISTRATION AND INFORMATION HOURS
The TechMecca Registration Desk will also serve as an information center. It is located in the Plaza Registration and will be open the following hours:
Monday February 3rd 7:00 a.m. – 5:00 p.m.
Tuesday February 4th 7:00 a.m. – 10:30 a.m.

NAME BADGES
Your name badge identifies you as a TechMecca registrant and is required for admittance to all program events. TechMecca is only open to registered participants. If you misplace your name badge or need a corrected version, please stop by the Registration Desk for a new one.

ATTIRE
Dress for all conference events is business casual.

NETWORKING RECEPTION
Join us Monday, February 3rd from 3:30 p.m. – 5:30 p.m. for an evening of hors d’oeuvres and drinks. You don’t want to miss this opportunity to network with exhibitors and industry peers in the Rio Grande Exhibit Hall. Name badges are required for this event.

PRIZE DRAWINGS
General Session: Attendees from financial institutions will have the chance to win cash prize drawings several times during the conference. We will also have a $500 Grand Prize Drawing during our closing general session on Tuesday afternoon. Each financial institution attendee will be entered to win. Attendees must be present to win and only financial institution attendees are eligible.

CONTINUING EDUCATION CREDITS
Certified Public Accountants (CPAs) may earn up to 7 continuing education credits (CPEs) for the 2014 TechMecca general and breakout sessions. For more information, please stop by the TechMecca Registration Desk.

BEST OF SHOW—INTERACTIVE SESSIONS
Notes on methodology:
Only audience members NOT associated with demoing companies were eligible to vote. IBAT employees do not vote. Attendees were encouraged to note their favorites during each day. At the end of the last demo, they chose their two favorites. The exact written instructions given to attendees: “Please rate (the companies) on the basis of demo quality and potential impact of the innovation demoed.” The two companies appearing on the highest percentage of submitted ballots will be named Best of Show.

INDEPENDENT BANKERS ASSOCIATION OF TEXAS

40th Annual Convention
September 27-30, 2014
Worthington Renaissance Hotel
Fort Worth, Texas
Accelerate your performance with

IBAT
Endorsed Provider

Abound Resources
Growth and Efficiency
Advisory Services, Technology Consulting
Ryan Esquell 512-351-3702

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Bill Saunders 800-869-0992 x106

Advantage Health Plans Trust*
Health, Dental, Vision, Long Term and Short Term Disability, AD&D, Group Term Life, and Voluntary Life
Melissa Nance 800-521-1711
*Paid Endorsement

American National Insurance Company
Credit Life and Gap Waiver Insurance
Kevin Moore 281-535-7469

The Baker Group
Broker/Dealer, A/L Management
Mike Mackey 888-480-0301

CSI SecureConnect
Board Portal
Employee Intranet
Bill Evers 800-545-4274 x19224

D+H
Mortgagebot™ - the leading end-to-end, cloud-based lending platform
Point-of-sale solutions
Next generation LOS
Anthony Chapman 941-225-1500

Dell SecureWorks
Information Security, Compliance, Risk Management Services, Security and Risk Consulting
Kevin Jordan 214-236-5339

Dell, Inc.
IBAT’s Dell ID #: GS126658178
Technical Consulting, Workstations, Servers, Printers, Desktops, Laptops, Ultrabooks, Tablets, Electronics and Accessories, Services and Software
Denney James 512-728-8763

Deluxe Corporation
Check Printing Services™ Deluxe Business Advantage℠ Deluxe Detect®
Deluxe Knowledge Exchange Solution™ Deluxe Proven℠
Janine Kasper 303-335-7627

Dial Dunkin & Associates
Credit Life Insurance, Balloon Note Financing
Dook Dunkin 800-234-6401

Diebold, Inc.
ATM Security Products & Services
Bank Operations Equipment & Supplies
Opteva® ATM Equipment
Integrated Services
Gary Guerrero 210-242-6123

First American Payment Systems
Merchant Processing Services
Cody Yanchak 817-317-7213

First Data Online Banking
Internet Banking Systems, Bill Payment
Jay Carrigan 512-970-9674

The Genesis Group
Advertising & Marketing
Melissa Kinion 800-725-3800

Glory Global Solutions
Teller Cash Dispensers, Teller Cash Recyclers, Quickchange Machines
James Robinson 325-692-0109

The Hertz Corporation
Car Rental Discounts, CDP #46681
Allyson Kealy 201-307-2381

John M. Floyd & Associates
Recruitment Services
Kim Kreps 512-263-7946
Overdraft Program Consulting
Mark Roe 800-410-3107

MG Architects
Architecture, Planning and Interior Design
Scott Clanton 713-552-0707

Promontory Interfinancial Network
CDARS
Insured Cash Sweep Service
Chuck McBryer 866-776-6426 x3432

PULSeSelect®/MoneyPass®
Surcharge-Free ATM Network
Mark Martin 832-214-0247

Call Curt Nelson: 512-275-2240 • www.ibatservices.com
Schedule at a Glance
Monday, February 3, 2014

7:30 am—5:30 pm  Conference Registration                  Plaza Registration
7:30 am—9:30 am  Breakfast                                    Grand Ballroom Foyer
9:00 am—10:15 am Prosecuting Wall Street - A Business Ethics Session from
                                             Citigroup Whistleblower
                                             Richard Bowen
10:15 am—10:30 am Refreshment Break                            Plaza Registration Foyer
10:30 am—11:30 am Concurrent Sessions
● Is your bank ready for today’s Mortgage Customer? - San Antonio
● Banker Perspectives: Mobile Strategy                         San Marcos
● Cracking the Branch Transformation Code: A Proven Process
  for Driving Impressive Results                               Sabine
● Leveraging Big Data for Big Results                         Pecos
11:30 am—2:30 pm  Expo Hall Open (includes lunch)               Rio Grande Exhibit Hall
2:30 pm—3:30 pm  Interactive Session                          Grand Ballroom
● Dell
● Pulse
● Verafin
● DBSI
● Buzz Points
● D & H
● FI Compliance
● Ignite Sales
3:30 pm—5:30 pm  Exhibit Hall Networking Reception            Rio Grande Exhibit Hall

Thank you for being part of

Tech Mecca 2014
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<td>• Better Data for Risk Mitigation</td>
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<td>• 10 Things Core Providers Don't Want you to Know</td>
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<td>• Current IT Challenges in Banking and Efficient Solutions</td>
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<td>• At the Corner of Information Security and Risk Management</td>
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<td>• Federal Reserve Payments Update</td>
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<td>Grand Ballroom</td>
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<td>Rio Grande Exhibit Hall</td>
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<td>Closing General Session</td>
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<td>Lee Wetherington</td>
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<td>Grand Prize Drawing</td>
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<td>Must Be Present to Win</td>
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TechMecca General Sessions

TechMecca Technology and Operations Conference attendees will benefit from the insight and wisdom of acclaimed speakers as they share priceless perspectives on meeting the challenges of your own business.

OPENING GENERAL SESSION
Monday, February 3, 2014
9:00 am—10:15 am
Grand Ballroom
Richard Bowen
Prosecuting Wall Street—A Business Ethics Session from CitiGroup Whistleblower
Richard Bowen is the “Citigroup whistleblower” who repeatedly warned Citigroup management, beginning in 2006, about risky business practices and potential losses related to mortgage lending.

Mr. Bowen not only warned the board of directors, but also requested an outside investigation of his business unit. Mr. Bowen testified before the SEC and the Financial Crisis Inquiry Commission about his experiences as a Business Chief Underwriter for Citigroup. His story was featured in an episode on “60 Minutes” and, most recently, in The New York Times.

As a Business Chief Underwriter he monitored credit quality over a business that involved the purchase and sale of $90 billion annually of residential mortgage loans. Richard Bowen is presently a senior lecturer at the University of Texas at Dallas, and is a popular speaker on business ethics and the financial crisis.

INTERACTIVE SESSIONS
Monday, February 3, 2014
2:30 p.m.—3:30 p.m.
Grand Ballroom
A total of 12 companies will take to the stage to present their latest and greatest innovations. The general sessions will showcase the cutting edge of financial technology.

#1—Dell
Product: Dell’s End to End Solution
Description: An end to end solution provides businesses with hardware, software, support and service. This means that not only can Dell provide the workstations for your business but we can deploy them, integrate your applications, provide consulting services, store your data in the cloud, store them onsite and protect your data and network as well and that is just the tip of the iceberg of what Dell can provide.
Speaker: Preston James

#2—PULSE
Product: Discover Debit
Description: Discover® Debit is a better choice in signature debit. Its attractive revenue opportunities and competitive program features allow issuers of all sizes a chance to experience a fresh alternative to other debit programs.
Speaker: Steve Sievert

#3—Verafin
Product: Verafin’s FRAML (FRaud detection + AML)
Description: Eugene Power will discuss many of the challenges that financial institutions face in their BSA/AML and Fraud departments. Eugene will highlight how Verafin’s FRAML (FRaud detection + AML) approach creates efficiencies while at the same time reduces duplication of work. He will outline the advantages of Verafin’s comprehensive all-in-one software including its easy-to-use workflows, integrated case management, visual dashboards, automated regulatory reporting and much more.
Speaker: Eugene Power

#4—DBSI
Product: Branch Transformation
Description: As one of the largest banks in the world, Rabobank was looking to grow their retail presence with a new flagship branch to be located near their Sacramento-area U.S. headquarters. Like most financial institutions, they saw the landscape of banking changing and knew they needed to break the mold and change their branch with it. Join DBSI for a short video case study to learn how Rabobank’s recent branch of the future defied banking traditions, complete with a branch opening of city officials, large crowds, news coverage, and ecstatic crowds.
Speaker: Tracy Kreitz, Market Manager

#5—Buzz Points
Product: Buzz Points
Description: A merchant-funded loyalty program that strengthens communities by rewarding local spending.
Speaker: Jay Valanju
TechMecca General Sessions

Tuesday, February 4, 2014
11:00 a.m.—12:00 p.m.
Grand Ballroom

#1—Dell SecureWorks
Product: Incident Response Case Study
Description: The Dell SecureWorks Incident Response and Digital Forensics practice provides rapid containment and eradication of threats, minimizing the duration and impact of a security breach. Leveraging elite cyber threat intelligence and global visibility, we can help you prepare for, respond to and recover from even the most complex and large-scale security incidents.
Speaker: Jeff Schilling

#2—March Networks
Product: Utilizing industry-leading IP video solutions to help financial institutions detect fraud, protect assets, and improve operations.
Description: March Networks continues to raise the bar with our best in class DVRs and cutting edge analytics. Our powerful new Searchlight application suite enables your teams to dramatically reduce the time and costs incurred with each investigation.
Speaker: Glen Good

#3—First American Payment Systems
Product: 1st PayPOS
Description: 1stPayPOS® is an economical, cloud-based, payment application designed for brick and mortar businesses of all sizes looking to replace antiquated, expensive cash registers with secure, robust payment acceptance and reporting capabilities.
Speaker: Cody Yanchak

#4—Deluxe
Product: Deluxe Detect
Description: Deluxe Detect® is one of the industry’s most effective tools for screening applicants. It uses configurable business logic and some of the industry’s most predictive data for identity verification to help you identify applicants with a prior history of fraud and/or account abuse, while also performing identity verification and compliance list screening.
Speaker: Kristin Towberman

#6—D & H
Product: D+H’s Mortgagebot Next Generation Lending Platform
Description: See a solution snapshot of D+H’s Mortgagebot™ platform and find out why it’s your best solution for easing compliance, capturing business and streamlining all origination processes!
Speaker: Shaun McCrary

#7—FI Compliance
Product: ERM 365 - Managing risk thru automation
Description: If your institution is using spreadsheets to manage risk, vendor relationships, or audit and exam findings it’s time to consider making a change. Come see how other bankers across the country are using automation to manage risk more efficiently and effectively.
Speaker – Eric Strohl and Deirdre Brett

#8—Ignite Sales
Product: BankGuide
Description: Ignite combines a recommendation platform with powerful analytics that match products to customer eligibility in real-time at the point-of-sale. Through everyday interactions with customers, bank management gains visibility to the potential relationship with each customer along with increased product sales as much as 150%.
Speaker: Mitchell Orlowsky
TechMecca General Sessions

#5—Passageways
Product: Board Portal
Description: From the Executive Administrators to the Board of Directors, Passageways OnBoard is the board portal software solution that helps Banks securely build, distribute and access board books to increase the performance of your board meeting.
Speaker: Paroon Chadha

CLOSING GENERAL SESSION
Tuesday, February 4, 2014
1:30 p.m.—2:30 p.m.
Grand Ballroom
Lee Wetherington
From the Future Backwards: Knowing Next Now

Why are 11% of banked consumers planning to switch financial institutions in the next 12 months and who are these people? What happens to PC-based online banking in a mobile-centric world of smartphones and tablets? How will banks fare with the advent of mobile payments and mobile commerce? Do community banks have unique advantages and opportunities in the world of post-Durbin payments? 2014 will be a wild ride but not one that is wholly unpredictable. Join Lee Wetherington for a forecast and summary of the industry’s best research on upcoming developments in online, mobile, payments and branches, and learn the strategic and tactical positioning that will best serve banks over the next 18 months.

IBAT 2014 Regional Meeting
Tour de Texas

WEEK 2
Tuesday, March 11

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<tr>
<th>Location</th>
<th>Event Type</th>
<th>Time</th>
<th>Location Details</th>
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<tbody>
<tr>
<td>Galveston</td>
<td>Breakfast</td>
<td>7:30am-9:00am</td>
<td>Salons ABC, Moody Gardens Hotel Seven Hope Blvd.</td>
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<tr>
<td>Schulenburg</td>
<td>Luncheon</td>
<td>11:30am-1:30pm</td>
<td>Frank's Restaurant 11 North Kessler Avenue</td>
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<tr>
<td>Harlingen</td>
<td>Reception</td>
<td>5:30pm-7:00pm</td>
<td>Uncle Buck’s Fish Bowl &amp; Grill Bass Pro Shop, 101 Bass Pro Dr.</td>
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Wednesday, March 12

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<tr>
<td>Corpus Christi</td>
<td>Breakfast</td>
<td>7:30am-9:00am</td>
<td>Corpus Christi Town Club 800 North Shoreline Blvd.</td>
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<tr>
<td>Houston</td>
<td>Luncheon</td>
<td>11:30am-1:30pm</td>
<td>Houston Racquet Club 10709 Memorial Drive</td>
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<tr>
<td>Kilgore</td>
<td>Dinner</td>
<td>5:30pm-7:20pm</td>
<td>Country Tavern Hwy 31 W</td>
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Thursday, March 13

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<tr>
<td>Sulphur Springs [Yantis]</td>
<td>Luncheon</td>
<td>11:30am-1:30pm</td>
<td>The Links at Lands End 285 Private Road 5980</td>
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<tr>
<td>Dallas</td>
<td>Reception</td>
<td>5:30pm-7:00pm</td>
<td>Las Colinas Country Club 4400 N. O’Connor Rd.</td>
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Monday, February 3, 2014
10:30 AM - 11:30 AM
San Antonio
Is Your Bank Ready for Today’s Mortgage Customer
Speaker: Dan Putney, D & H
Pre-mortgage-meltdown consumers never cared much where they borrowed money. Today that has changed and first choice for many in applying for a mortgage is a bank they trust. However, if this trusted provider doesn’t move quickly, confidently, and transparently, the customer moves on (and shares the story, probably on Facebook). So how do lenders ensure that customers’ (and of course regulators’) expectations for 24/7, anytime, anywhere mortgage application processing are met without breaking the bank? This session discusses challenges, opportunities, and best practices in application processing that can help ensure your bank is ready for every “new” mortgage customer.

Monday, February 3, 2014
10:30 AM—11:30 AM
San Marcos
Banker Perspectives: Mobile Strategy
Speaker: Kevin Monk, Alliance Bank - Sulphur Springs; Pam Thomas, Frost Bank; Matt Smith, Happy Bank
Join us for a casual discussion on mobile solutions. Whether you’re considering a mobile presence or trying to fine tune your existing mobile presence, this session will shed light on the issues you need to consider, as identified by bankers who have blazed the trail to mobile.

Monday, February 3, 2014
10:30 AM—11:30 AM
Sabine
Cracking the Branch Transformation Code: A Proven Process for Driving Impressive Results
Speaker: DBSI - John W. Smith, CEO and Kurt Klassen, SVP of Sales and Marketing
Need a little guidance on how to start creating your branch of the future? Every bank, regardless of how many branches they have, is searching for the right combination of tactics, technology and design to improve their profitability and branch experience. Join DBSI and several industry veterans, as they review current market drivers, the right questions to ask for laying a foundation of success, and real life examples of branch transformation projects done right.

Monday, February 3, 2014
10:30 AM—11:30 AM
Pecos
Leveraging Big Data for Big Results
Speaker: Money Desktop
It is critical for your bank to hone in on strengthening the customer/bank relationship, and leverage that relationship to position your bank as your customer’s PFI (primary financial institution). Aggregating internal and external customer data, implementing superior technology and proper data management are keys to big data. Big data will allow you to tailor and deliver product offers in a way that customers will thank you for.

Tuesday, February 4, 2014
8:30 AM—9:30 AM
San Antonio
EMV Forum: Following the Expectations of EMV and How It Will Impact Your Bank, merchants and Customers
Speaker: Pulse, First American Payments, Lee Wetherington - Moderator
Recent data breaches have put card security and EMV in the national spotlight. Join Lee Wetherington and panelists in discussing the impact EMV will have on banks, merchants and consumers.

Tuesday, February 4, 2014
8:30 AM—9:30 AM
San Marcos
Understanding and Building a Proactive ATM Upgrade Plan to Stay Compliant and Competitive
Speaker: Dean Stewart, Diebold
A trifecta of compliance directives with April 2014 deadlines have many financial institutions (FIs) back on their heels playing catch-up. These mandates require upgrades to automated teller machine (ATM) operating systems, Encrypting PIN Pads (EPPs) and card readers. Failure to comply greatly increases risks for FIs, including security vulnerabilities and steep fines. But thankfully these upgrades can be managed via a single strategy. The most critical mandate slipping under the radar of many FIs requires upgrading ATMs to the Windows 7 operating system. Microsoft will end support for Windows XP in April, leaving ATMs that continue to run the system noncompliant with Payment Card Industry (PCI) requirements and vulnerable to increased threats. PCI directives also require all ATMs installed after April to have
enhanced EPPs that secure users’ PINs. And a series of Europay, MasterCard and Visa (EMV) updates, beginning in April, will shift counterfeit card fraud liability to FIs that don’t accept EMV chip cards at ATMs. It’s beyond the time to address these compliance directives, as it may take months to complete required upgrades. Learn what’s at risk by delaying these upgrades and how your FI can manage them via one strategy, rather than a series of updates, to maximize efficiency and ensure compliance.

KEY TAKEAWAYS: 1. Learn what compliance changes are on the horizon, including Windows 7, Encrypting PIN Pad (EPP) and Europay, MasterCard and Visa (EMV) requirements, and the risks your financial institution faces by not complying with them. 2. Review the importance of implementing a holistic and proactive plan to ensure your financial institution remains compliant and competitive in the coming years. 3. Learn how to streamline the management of new compliance directives via one upgrade strategy, rather than a series of updates, to make the best use of resources.

Tuesday, February 4, 2014
8:30 AM—9:30 AM
Sabine
Better Data For Risk Mitigation
Speaker: Kristin Towberman, Deluxe

Financial Services is one of the top industries that has the most consumer data. As an industry the data that is available to us challenges us in many ways including; what that data means, differentiating good data from data that may not be helpful, figuring out how to leverage and utilize the data once its differentiated, as well as how to safeguard your bank and your account holders with the information they trust you with. Finally, once that is all figured out, examiners expect you to stay compliant. Spend time with Deluxe understanding how “better data” can be used for risk mitigation.

Tuesday, February 4, 2014
8:30 AM—9:30 AM
Pecos
10 Things Core Providers Don’t Want You to Know
Speaker: Aaron Silva, Paladin FS

Only once in every 5-7 years the opportunity to negotiate and renew the multi-million dollar relationship (s) you have with Core & IT Vendors (Fiserv, Fidelity, Jack Henry, OSI, CSI, Intuit, etc.) is made available and you cannot make a mistake. Non-Interest Expense (NIE) for services such as Account & Item Processing, Internet Banking, Bill Payment and EFT/ATM are higher than ever before because there are fewer competitors in a post-consolidation [vendor] world. The facts are that these multi-billion dollar organizations have large teams of contract writers and legal departments ensuring that the agreements you are about to sign are more “vendor-leaning than bank leaning.” Naturally, the deck is stacked against your bank and today any financial mistake or overlooked contract term can be a major problem for your franchise and shareholders down the road. Presenting as former Core & IT vendor executives now providing research for bankers, in this session Paladin will outline at least 10 tactical and strategic considerations you should take to the negotiating table when it comes time to start or renew services with any vendor. Outlining practical examples of real-life negotiations and outcomes provides a backdrop for creative ideas resulting in getting the best price and greatest value for the NIE. Ways to put more ‘teeth’ into Service Level Agreements and protect shareholders are discussed. This is not a discussion about vendor due diligence, contract management, compliance or how to conduct a negotiation or RFP process. This session provides methods and insights geared at generating specific decision intelligence for senior executives responsible for managing these costs and services.

Tuesday, February 4, 2014
9:45 AM—10:45 AM
San Antonio
The A to Z’s of Vendor Management
Speaker: Ryan Esquell, Abound Resources

This session will outline the key elements of an effective vendor management program, including the reasons to have a vendor management program; vendor selection; contracts; auditing and monitoring; pre- and post-contract risk and due-diligence assessments; privacy, data protection, security and compliance requirements; regulatory requirements; the role of standards such as PCI & SSAE 16; and a whole lot more. You’ll gain practical tips for implementing and maintaining a comprehensive vendor management program and take away requirements documents and models.
Concurrent Sessions

Tuesday, February 4, 2014
9:45 AM—10:45 AM
San Marcos
**Current IT Challenges in Banking and Efficient Solutions**
*Speaker:* Cal Roberson, Caltech

Whether it's accurately forecasting IT expenses each year or the struggle to find good IT help that will stick around, maintaining a secure, reliable and efficient network at a community bank is no small task. In addition, IT staff is often too busy with the daily maintenance of a network that there is little time to be strategic about the most efficient use of technology within the bank. During our breakout, we will discuss several of the challenges that we see in the 90+ banks we support as well as efficient solutions that we use every day.

Tuesday, February 4, 2014
9:45 AM—10:45 AM
Sabine
**At the Corner of Information Security and Risk Management**
*Speaker:* Jeff Multz, Dell SecureWorks

Join Jeff Multz, Dell SecureWorks Security Evangelist, for the educational At the Corner of Information Security and Risk Management session. He’ll explain why connecting the business to information security can help manage and mitigate risk of an information security incident. You’ll also learn: Why security is risk management, What the FFIEC wants you to do about it, How to assess and mitigate information security risk, Determining which assessment is right for your bank. You’ll leave this session with an understanding of the critical function information security plays in risk management and how to assess potential risk.

Tuesday, February 4, 2014
9:45 AM—10:45 AM
Pecos
**Federal Reserve Payments Update**
*Speaker:* Matt Davies, Federal Reserve Bank - Dallas

This session will provide attendees with an update on the Federal Reserve's current and future payment initiatives. The Federal Reserve recently issued a public consultation paper on payments system improvement, which identified gaps and opportunities in the U.S. payments system. Attendees will learn about feedback received by the Fed on the paper, and what the Fed intends to do with that feedback. We will also discuss the results of the Federal Reserve's most recent triennial retail payments study, and what those results may mean to attendees. Attendees will also be able to pose questions on topics of interest related to the Federal Reserve and payments.

Mark your calendar!

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JW Marriott San Antonio Hill Country Resort & Spa
For 35 years, The Baker Group has helped community financial institutions steer through unpredictable economic environments with the use of robust tools and resources for interest rate risk and investment portfolio management. Moving through 2014, we must set our focus on strategies that raise our performance and meet new challenges. Our task is to help financial institutions develop effective processes and strategies for optimal performance in any environment.

Our proven approach of total resource integration utilizing software and products developed by Baker’s Software Solutions* — combined with our solid investment experience and advice — makes us the investment firm of choice for financial institutions. When facing the challenge of an uncertain environment, The Baker Group can help you win the performance challenge.

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To find out how The Baker Group can assist your institution in defining and meeting its financial objectives, call your Baker representative or Ryan Hayhurst at 800.937.2257.
Richard Bowen
University of Texas, Dallas

Richard Bowen has been described in the news media, including the Wall Street Journal, CBS Evening News, and 60 Minutes as the Citigroup whistleblower who repeatedly warned Citi executive management, beginning in 2006, about risky business practices and potential losses related to mortgage lending.

His warnings included a November 3, 2007, email to Robert Rubin, Chairman of the Executive Committee of the Citigroup Board of Directors, the Citigroup Chief Risk Officer, Chief Financial Officer and Chief Auditor. In this email, which was disclosed in public testimony, Mr. Bowen attempted to warn Citigroup management and the board of directors about the extreme risks and potential losses to shareholders existing in his business unit. In this email Mr. Bowen also requested an outside investigation of his business unit.

Mr. Bowen testified in open hearing on April 7, 2010, before the Financial Crisis Inquiry Commission about his experiences as Business Chief Underwriter for the Consumer Lending Group of Citigroup. In this position he had credit quality control responsibility over a business that involved the purchase and sale of $90 billion annually of residential mortgage loans. Mr. Bowen’s story has been widely reported in the news media and is also included in The Financial Crisis Inquiry Report, the congressional commission’s official report to Congress and the President of the United States.

Mr. Bowen’s experiences are also highlighted in the 60 Minutes story, Prosecuting Wall Street. “I started raising those warnings in June of 2006. The volumes increased through 2007 and the rate of defective mortgages increased to in excess of 80 percent,” Bowen told Steve Kroft in the interview that aired on 60 Minutes on December 4, 2011.

Mr. Bowen has thirty-five years banking experience and has held executive positions in credit, finance, and information technology. Prior to Citigroup Mr. Bowen was Senior Vice President with Associates First Capital Corporation and Bank One Corporation.

Mr. Bowen is currently a Senior Lecturer of Accounting and Finance at the University of Texas at Dallas and is a popular speaker in the field of business ethics. He has a BS in Mechanical Engineering from Texas Tech University and a Master of Business Administration from the University of Texas at Austin. He is also a Certified Public Accountant in the state of Texas, and was named CPA of the Year by the Dallas Society of CPA’s earlier this year.

Mr. Bowen was also recognized in the May/June issue of D CEO magazine as the recipient of its 2012 Financial Executives Award for Excellence in Corporate Governance. And he has also been featured in the cover story of the May/June issue of Workforce Management magazine.

Matt Davies, AAP
Federal Reserve Bank of Dallas

Matthew C. Davies, AAP, has over 14 years of experience in the electronic payments industry, ten of them as ACH Specialist with the Federal Reserve Banks of Kansas City and Dallas. He has also served as a product manager in the bankcard and commercial banking industries.

Matt earned his Accredited ACH Professional (AAP) status in 2000. He has frequently presented ACH topics for Federal Reserve seminars, and has spoken at industry conferences and seminars such as those sponsored by SWACHA and local chapters of the Association for Financial Professionals (AFP). He is a co-author of the working paper Nonbanks in the Payments System, published in book form by the Federal Reserve Bank of Kansas City in 2003.

A native of St. Louis, Missouri, Matt graduated from William Jewell College in Liberty, Missouri, with a Bachelor of Arts degree in Political Science and History.

Kurt Klassen, DBSI

Kurt Klassen is the Senior Vice President of Sales and Marketing at DBSI, and brings over 16 years of experience in implementing effective programs for the financial industry. He has created and delivered strategic business solutions for some of the largest banks and credit unions and spoken at over 15 industry events.

Jeff Multz
Dell SecureWorks

Jeff Multz is the Director of North America Midmarket Sales for Dell SecureWorks (SecureWorks was acquired by Dell Inc. in February 2011). Jeff has been an integral member of SecureWorks since 2003. He oversees the commercial sales team responsible for increasing company revenues by building new clients across all industries and offering new services to existing ones. He and his team help organizations of all sizes reduce their business and IT security risks and augment their IT team where needed.

Prior to joining SecureWorks, Jeff was recruited by Firstwave Technologies to become a part of the executive
Speaker Backgrounds

Jeffrey R. Sievert

A team that successfully championed a corporate turn-around, resulting in its stock being ranked #1 on all U.S. Exchanges in 2002. At age 24, Jeff founded Emerging Market Technologies (EMT), an Atlanta-based company recognized as the nation’s leading reseller of Customer Relationship Management and Sales Force Automation solutions.

He grew EMT from a self-funded start-up business to a highly profitable company that was acquired by Zland Corporation in 2000. As a former programmer for financial institutions, Jeff has a pulse on the financial industry, understanding the challenges that banks and credit unions face regularly. He often addresses organizations on IT security through educational presentations and articles in the media.

Additionally, he is the co-author of Successful Telemarketing (1995) and numerous white papers on leading edge sales, marketing and service strategies. To add to his credentials, Jeff is a graduate of Mercer University and holds a Bachelor of Science Degree in Computer Science. He is also a nationally certified financial supplier through CUES.

Cal Roberson

Caltech

Cal Roberson has worked in technology support for 15+ years; 12 of those years have been with CalTech. In his current role as Mentor/Senior Engineer, Cal is responsible for onboarding new customers and new technicians to create strong customer relationships. Cal was instrumental in helping CalTech grow from a small local IT support company into a regional provider of IT services for financial institutions. He spearheaded the creation of the first branch office for CalTech and continues to run that office today. Cal currently holds multiple Microsoft, Cisco and VMware certifications. He lives in Corinth with his wife and two boys and is an active runner, cyclist and triathlete.

Steve Sievert

PULSE, a Discover Financial Services Company

Steve Sievert serves as Executive Vice President of Marketing and Communications for PULSE, a Discover Financial Services company and operator of the PULSE® electronic funds transfer (EFT) network, headquartered in Houston, Texas.

Mr. Sievert joined PULSE in 2007 and is responsible for managing communications, marketing, and public-relations activities for the company. He also oversees the network’s professional development and training programs, and PULSE’s brand-development initiatives. Mr. Sievert has 25 years of communications and marketing experience, working for both publicly traded and private companies, including Compaq Computer Corporation, Texas Children’s Hospital, US Oncology and Baylor College of Medicine. He began his career as a broadcast journalist in radio and television, and was a sports reporter and columnist at the Houston Chronicle.

Mr. Sievert is a graduate of the University of South Carolina with a Bachelor of Arts in Journalism.

Aaron Silva

Paladin FS

Aaron Silva is a recognized industry veteran, speaker and the President of Paladin fs, LLC – a research and consultancy firm located in the San Francisco Bay Area. Aaron appears at banking and credit union association events nationally and is a published writer on strategic and technology issues facing communality financial institutions. Aaron is the former President & CEO of OASYS Network Solutions, in addition to holding several other senior executive positions with technology vendors servicing the community financial industry.

Brett Skousen

Money Desktop

Bret Skousen is executive vice president of business development for MoneyDesktop, a provider of online banking-based personal financial management (PFM) and data analytics tools for banks and credit unions. In the past, Bret has managed the marketing and public relations team and now continues to maintain strategic partnerships for the company.

Bret’s 20+ years of executive leadership at companies like Black & Decker (B&D), and most recently Mountain America Credit Union (MACU), have resulted in a business acumen that is both broad and deep. At MACU, Bret implemented a completely new product development process from which the first product developed under this process resulted in an increase of over 50% profitability per user. At B&D, Bret's sales territories consistently over performed expectations by 15 to 20% and, as a testament to Bret’s passion for building high performing executive teams, he was responsible for creating the BBHHI University, where B&D’s leadership is trained, groomed and developed. As an avid outdoorsman, Bret enjoys hiking, camping, horseback riding and ATV sports. Bret’s greatest loves are his wife and three daughters.
Brad Smith
Abound Resources
Brad has spent the last 20+ years helping community and regional financial institutions achieve their business goals by integrating strategy with sales, marketing, operations and technology execution. He is co-founder and President of Abound Resources.

John W. Smith
DBSI
As CEO of DBSI, John is a thought leader in the financial industry and has led several creative initiatives to help name DBSI ‘Best of the Future’ as well as the ‘Top 5 of the 100 Best Companies’ in Arizona. He spearheaded the creation of the Ideation Center™ and Collaboratory™ at DBSI, which showcases the “Bank of the Future” and it’s designs, latest technologies, services, and the means to test all client initiatives before market release. As a 19-year veteran in the retail banking industry, John has spoken at 20+ industry events, co-authored several white papers, and led industry research projects.

Matt Smith
Happy State Bank
Matthew Smith is Vice President at Happy State Bank over electronic banking services and product development. Matthew directs the bank’s internal development staff as well as creating vendor relationships to ensure Happy State Bank stays in an innovative state of mind to deliver the complete user experience through the electronic banking customer service channels. Before moving into product development he has overseen the internet banking platform which has quadrupled in size over five years, has served on advisory boards for companies such as First Data regarding internet banking services and has recently rolled out new mobile banking apps to ensure the bank stays competitive in mobile banking.

Dean Stewart
Diebold
Dean Stewart is senior director of self-service product management at Diebold, Incorporated. Since becoming a member of the product marketing and management leadership team in February 2009, he participates in the development of products around the world. He is responsible for portfolio management of Diebold’s self-service products.
Stewart joined Diebold in 1996. Since that time, he has been involved in various projects to introduce new technologies into self-service. These include smart cards, advanced encryption and key management techniques and communications. He remains active with accessibility standards and the effort to make ATMs accessible for all.

Stewart received a bachelor’s degree in computer science from Ohio University in Athens, Ohio. He received his project management professional certification from the Project Management Institute in 2003. Originally from Kittanning, Pennsylvania, he now resides in Canton, Ohio with his wife and daughter.

Pam Thomas
Frost Bank
Pam Thomas serves as executive vice president/marketing for Cullen/Frost Bankers, Inc. (NYSE: CFR) a financial holding company, headquartered in San Antonio, Texas, with $20.5 billion in assets at March 30, 2013 and more than 110 financial centers throughout Texas. One of 24 U.S. banks included in the KBW Bank Index and a top 50 U.S. bank by asset size, Frost provides a wide range of banking, investments and insurance services to businesses and individuals in the Austin, Corpus Christi, Dallas, Fort Worth, Houston, Rio Grande Valley and San Antonio regions. Founded in 1868, Frost has helped clients with their financial needs during three centuries.

Pam is responsible for statewide marketing, advertising and public relations efforts for Cullen Frost. She has been instrumental in the development and execution of several award-winning marketing campaigns for Frost, including the 2001 Map Preservation project and the Revealing Character tintype photography exhibition and print campaign. In 2002, she received national recognition from U.S. Banker magazine when she was named one of five bank marketing all-stars.

She currently serves on the Brite Divinity School Board of Trustees and the Children’s Bereavement Center of South Texas Board of Directors. Pam is a member of First Presbyterian Church, The TCU Alumni Association, the Junior League of San Antonio and the San Antonio Pi Beta Phi Alumnae Club.

She graduated magna cum laude from Texas Christian University with a Bachelor of Business Administration degree. She garnered magna cum laude honors and an MBA from Southern Methodist University.

She is married to David Hugh Thomas III. David is a commercial real estate appraiser with the firm of Dugger, Canaday and Grafe. Pam and David enjoying traveling, cooking and relaxing with friends and family.
Speaker Backgrounds

Kristin Towberman  
**Deluxe Corporation**  
Kristin Towberman is a Business Development Executive at Deluxe Corporation working with Deluxe’s Risk Management suite of services. In this capacity, she is responsible for partnering with Financial Service Organizations including Deluxe Detect (New Applicant Screening & Compliance Solution), Deluxe ID Authentication (Knowledge Based Authentication/Out Of Wallet Questions) and Deluxe Provent (Identity Theft for Consumers & Small Businesses). Kristin attended the University of Minnesota Duluth and has been part of the Deluxe team for 7 years. Prior to joining Deluxe, Kristin worked in the Financial Services Industry from 2002 until 2006. While Kristin was a banker, some of her accomplishments include: launching a Regional Bank, merger/acquisition at a Community Bank and improving operations at a Credit Union. Kristin lives in Dellwood, Minnesota with her husband Ben and their 7 year old daughter Taylor. In her free time, Kristin enjoys golfing, downhill skiing and playing with the family puppy Dexter.

Jay Valanju  
**Buzz Points**  
Mr. Valanju brings 13 years of entrepreneurial experience in financial services, social media, and telecommunications. Prior to founding BuzzBanking, he was a Partner at Steinwasser, Inc., a technology and business consulting firm with offices in Texas and Germany. There he specialized in business consulting in financial services, healthcare technology and energy. Mr. Valanju was a founder of Fusion Mobile, a wireless Mobile Virtual Network Operator with operations in regional retailers with operations in over a dozen states. Prior to Fusion, Mr. Valanju was Director of Business Development at Pluck Corporation, a social media company which was later purchased by Demand Media. At Pluck, he managed programs with eBay and traditional printed media properties. He was also a co-founder of FundsXpress where he worked on business strategy and technology. FundsXpress is an Internet banking and financial services company serving financial institutions nationwide. FundsXpress was acquired by First Data Corporation. Mr. Valanju is a business and technology strategy advisor to the Managing Editor of the PetroChem Wire, the leading Ethylene daily industry newsletter and index for NYMEX/CME Group contracts. He was also a business advisor to EosHealth, a company bringing next generation disease management and healthcare programs to patients worldwide via social media. Mr. Valanju has served as a scientist conducting research in astrophysics for a research group at UC Berkeley. He has a B.A. in Physics from The University of California at Berkeley and holds an MBA from The University of Texas at Austin where he focused on Entrepreneurship and Technology Commercialization.

Lee Wetherington  
**ProfitStars, A Jack Henry Company**  
Lee Wetherington, AAP, is Director of Strategic Insight for ProfitStars®, a division of Jack Henry & Associates® (JKHY: NASDAQ). Lee directs the development of actionable insight and strategy for the financial services industry. To this end, he creates programs, presentations, and articles designed to orient and educate financial executives on the trends and implications of new technologies. He routinely delivers keynotes nationwide focusing upon opportunities and challenges in e-banking and payments, and he is widely renowned for his unique style and dynamic delivery.

Lee has delivered over 300 keynotes for state and national trade groups, including the Independent Community Bankers of America (ICBA), American Bankers Association (ABA), Bank Administration Institute (BAI), Federal Deposit Insurance Corporation (FDIC), Federal Reserve Bank of Atlanta, American Institute of CPAs (AICPA), and the National Automated Clearinghouse Association (NACHA). He also serves as the Technology Faculty Chair for several regional schools of banking and finance. Lee’s articles and commentary have been published in American Banker, BAI’s Banking Strategies, ABA’s Bank Marketing and ICBA’s Independent Banker.

Lee received bachelor degrees in Economics and English from Duke University in 1990, and, in 1993, he completed graduate studies at Emory University. In 1995, he earned the distinguished Accredited ACH Professional (AAP) certification from the National Automated Clearing House Association (NACHA).

Cody Yanchak  
**First American Payment Systems**  
With over 7 years experience in the processing industry Cody pursues and cultivates partnerships with financial institutions looking to offer electronic payment processing to merchants. Formerly with Chase Paymentech and Century Payments, Cody focused on providing solutions to merchants and partners alike, giving him the ability to view partnerships and programs from several perspectives. With an educational background in Business Management and a passion for finance, Cody is well-equipped to offer customized solutions to financial institutions.
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For more information on IBAT promotions please visit dell.com/IBAT or call 1-800-757-8442 and mention member link ID: GS126658178. For orders more than 5 please reach out to the dedicated IBAT account manager Denney James at denney_james@dell.com or 512-728-8763.
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- Buzz Points, Inc.
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- The Baker Group
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- FTSI, Inc.
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- Network Box USA, Inc.
- Outsource ATM
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- Automated Business Systems
- CalTech
- Datacard Group
- DBSI, Inc.
- Diebold
- FTSI, Inc.
- Glory (USA) Inc.
- Passageways, LLC
- SHAZAM
- Technique Data Systems, Inc

### Banking Software
- 21St Century Financial Services
- American Bank Systems
- Automated Business Systems
- Automated Systems, Inc.
- Banker's Toolbox
- Cardinal Software, Inc.
- First Data
- FTSI, Inc.
- Integrated Bank Technology
- Jack Henry & Associates
- LoanStreet LLC
- Marquis
- PROFORMANCE
- SNL Financial

### Broker/Dealer Services
- The Baker Group

### Business Intelligence
- Marquis
- SNL Financial

### Cash Products & Services
- FTSI, Inc.
- Technique Data Systems, Inc

### Check Imaging
- Automated Systems, Inc.
- Banc Statements, Inc.
- Cardinal Software, Inc.
- CFC Technology Corporation
- Computer Service Professionals, Inc. (CSPI)
- Diebold
- Integrated Bank Technology
- Jack Henry & Associates
- VSoft Corporation

### Check Services
- Automated Business Systems
- Deluxe Corporation
- Technique Data Systems, Inc
- VSoft Corporation

### Communications Hardware & Software
- CalTech
- Datacard Group
- I.T. Works
- Passageways, LLC
- PrintMail Systems, Inc.
- Resilient Intelligent Networks
- Solis, Inc.

### Compliance
- Abound Resources
- American Bank Systems
- Banker's Toolbox
- CoNetrix
- D+H
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- Dell SecureWorks
- Diebold
- FTSI, Inc.
- I.T. Works
- Integrated Bank Technology
- Marquis
- Network Box USA, Inc.
- Passageways, LLC

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- Abound Resources
- BKD, LLP
- CalTech
- CoNetrix
- Diebold
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### Consulting-Financial
- Abound Resources

### Credit Cards
- Columbus Data Services
- Custom Card Systems
- PULSE

### Customer Relationship Management
- Deluxe Corporation
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- Integrated Bank Technology
- Jack Henry & Associates
- Marquis
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PULSE
SHAZAM
TransFund

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PULSE
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First American Payment Systems, LLC
PULSE
TransFund
VSoft Corporation

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PULSE
SHAZAM
Technique Data Systems, Inc
TransFund

Employee Incentive Programs
Marquis

Equipment Leasing
Diebold

Expense Management
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PULSE

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Banc Statements, Inc.

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AvTech Solutions
Buzz Points, Inc.
CalTech
CoNetrix
Dell Inc.
First Data
I.T. Works
PROFORMANCE
SMA Solutions
Solis, Inc.
WebEquity Solutions, LLC

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Dell SecureWorks
FTSI, Inc.
I.T. Works
LoanStreet LLC
Network Box USA, Inc.
Passageways, LLC
PrintMail Systems, Inc.
Resilient Intelligent Networks
SMA Solutions
Solis, Inc.
Supernal Software
Unicom Technologies, Inc.
WebEquity Solutions, LLC
Zix Corporation

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Abound Resources

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Computer Service Professionals, Inc. (CSPI)
D+H
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Dell SecureWorks
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Unicom Technologies, Inc.

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Investment Management Services
The Baker Group

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AutoFX2
D+H
LoanStreet LLC
Schwartz & Associates

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Automated Business Systems
Technique Data Systems, Inc

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D+H

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Supernal Software
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Washington Policy Summit

BUDGET INFORMATION
- Room rate: $289 + applicable taxes
- ICBA Washington Policy Summit Registration Fees: $350 per vendor / $300 per vendor spouse
- No charge to attend IBAT only events

TENTATIVE SCHEDULE
Tuesday, April 29
5:30 – 7:00pm  IBAT Briefing & Welcome Reception

Wednesday, April 30
7:15 – 9:30am  ICBA Breakfast/General Session
10:00 – 2:30pm  IBAT Hill Visits
2:45 – 5:00pm  IBAT Group Meeting with Key Officials
5:15 – 6:00pm  IBAT Group Meeting with Senators
6:30 – 9:00pm  IBAT Group Dinner
9:00pm – 12:00am  IBAT Monument Tour

Thursday, May 1
7:30 – 9:30am  ICBA Breakfast/General Session
2:00 – 3:00pm  ICBA Meeting with CFPB
3:00 – 4:00pm  ICBA Meeting with (choose one) FDIC/Fed/OCC
6:30 – 9:00pm  ICBA Reception/Dinner

Friday, May 2
Group Departure
### Exhibitor Quick Reference—Alphabetic

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<th>Exhibitor Name</th>
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<td>21St Century Financial Services</td>
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Austin, TX 78750
512-351-3702
www.aboundresources.com
Ryan Esquell (Ryan), resquell@aboundresources.com
Description: Abound Resources is a full service management consulting firm devoted to community financial institutions. The company offers an array of services designed to improve performance and profitability and help cope with an increasingly stringent regulatory environment.

212
AccuSource Solutions
1406 Dunn Dr.
Carrollton, TX 75006
800-869-0992
www.accusourcesolutions.net
Mark Wood (Mark), mwood@accusourcesolutions.net
Description: AccuSource Solutions brings the purchasing power of over 190 independent banks to IBAT member banks, guaranteeing lower prices on printed forms, office supplies, stamps and other operational supplies. Our program is designed to give the community banker a more holistic solution to purchasing and controlling supply costs. By dealing with one vendor who produces, inventories, tracks and delivers the product the soft dollar savings of employee manpower are of equal value to the hard dollar savings. With AccuSource Solutions, your bank will stop spending a dollar to save a dime.
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Austin, TX 78759
512-336-3000
www.aciworldwide.com
Bill Gibson (Bill), bill.gibson@s1.com
Description: ACI Community Financial is a specialized division of ACI Worldwide, which offers ACI Self-Service Banking, a suite of secure, configurable packaged solutions available on a single payments platform targeted to progressive community financial institutions committed to innovation and differentiation. Visit www.aciworldwide.com for more information.
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American Bank Systems
PO Box 20668
Oklahoma City, OK 73156
405-607-7000
www.abs-ok.com
Bill Martin (Bill), bmartin@abs-ok.com
Description: American Bank Systems develops software solutions designed to increase the day-to-day efficiencies for small, mid-sized and large banks. Our products are designed by bankers for bankers and include solutions for Document Imaging and Management, Exception and Collateral Tracking, Automated Compliance and Risk Management and Loan & Deposit Origination.

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Katy, TX 77450
832-594-3493
www.autofx2.com
Michael Hergenrader (Michael), mhergenrader@autofx2.com
Description: With AutoFX2, banks can provide customers with vehicle shopping tools, calculator and an easy loan application process. Our proprietary software is branded to your bank and delivers loan requests directly to your lending department for processing and approval. We build customer relationships and deliver more loans and revenue to banks.
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801 E. Plano Pkwy, Suite 208
Plano, TX 75074
214-778-2983
www.avteksolutions.com
Wayne Hunter (Wayne), wayne.hunter@avteksolutions.com
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The Baker Group
1700 Rio Grande St., Ste. 120
Austin, TX 78701
888-480-0301
www.gobaker.com
Mike Mackey (Mike), mikem@gobaker.com
Description: The Baker Group is a leader in the development of asset/liability and investment portfolio strategies for community financial institutions. As an independently owned firm, the company specializes in products and programs designed to specifically address community banks’ needs in investment portfolio analysis, security selection and interest rate risk management.

117
Banc Statements, Inc.
4829 West Royal Lane
Irving, TX 75063
972-345-1399
www.bsisite.com
Kristy Cofield (Kristy), kcofield@bsisite.com
Description: Banc Statements, Inc. (BSI) specializes exclusively in providing community banks an outsourcing solution for printing and mailing DDA and savings statements. BSI is highly secure, fast, accurate, and SAS 70 Type II/SOC II Type II audited. BSI has facilities in Dallas, TX and Birmingham, AL.

423
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4516 Seton Center Pkwy, Ste. 300
Austin, TX 78759
512-744-7485
www.bancvue.com
Greg Wembe (Greg), greg.wembe@bancvue.com
Description: BancVue provides innovative products, marketing and consulting to community financial institutions nationwide. With media impact that rivals the megabanks, its national brand Kasasa helps increase new account openings, profitability, non-interest income and retention. To date, Kasasa has attracted over 200,000 new accounts and generated over $42 million in non-interest income.

118
Banker’s Toolbox
10431 Morado Circle, Suite 300
Austin, TX 78759
512-279-5792
www.bankerstoolbox.com
William Bennett (William), william@bankerstoolbox.com
Description: Banker's Toolbox supports America's community financial institutions with simple solutions to complex problems while building a community of happy employees and customers. Our product suite consists of comprehensive solutions for money laundering detection and reporting, risk management, secure wire processing automation and commercial real estate loan portfolio risk assessment. For more information visit www.bankerstoolbox.com.

309
BKD, LLP
2800 Post Oak Blvd., Ste. 3200
Houston, TX 77056
713-499-4600
www.bkd.com
Kelsey O'Dell (Kelsey), kodell@bkd.com
Description: BKD, LLP is one of the largest CPA and advisory firms in the country. Our financial institution services include audit, tax compliance and consulting, internal audit outsourcing, loan review, regulatory compliance, information technology consulting and security services, merger and acquisition consulting and ESOP planning to over 1,200 financial institutions.

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Branch Serv, A Division Of Custom Vault
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Bethel, CT 6801
203-403-4205
www.customvault.com
David Pepin (David), dpepin@customvault.com
Description: BranchServ, a division of CustomVault, is a leading independent provider of comprehensive physical and electronic security equipment and service solutions. Its offerings now include a suite of branch formation products; ATMs, cash recyclers and new branch solutions. BranchServ’s product line is complemented by an outstanding service organization with stellar site metrics that enhance BranchServ clients’ ability to increase efficiencies, reduce costs and ensure optimal end-customer banking experiences. BranchServ now serves more than 12,000 bank branches and credit unions nationwide, including three of the ten largest branch banking networks in the United States.
Buzz Points, Inc.  
3815 S Capital of Texas Hwy, Austin, TX 78705  
Mark Gunstenson (Mark), mgunstenson@buzzpoints.com  
Description: The Buzz Points Rewards Program is the next generation in merchant-funded rewards programs and a substantial driver of non-interest revenue for financial institutions. Buzz Points aligns the interests of financial institutions, local merchants, and consumers in order to benefit all stakeholders, while also integrating social media platforms that increase consumer engagement.

Cachet Financial Solutions  
Southwest Tech Center A  
Minneapolis, MN 55344  
952-698-6980  
www.cachetfinancial.com  
Ben Swearengen (Ben), bswearengen@cachetfinancial.com  
Description: Cachet Financial Solutions is a leading provider of remote deposit capture (RDC) solutions. Our industry-leading platform has simplified the process for delivering, implementing and servicing RDC initiatives. Cachet offers commercial and consumer solutions for MAC, PC, and Mobile, providing financial institutions, and their customers, greater flexibility and freedom.

CalTech  
4152 S. Jackson St.  
San Angelo, TX 76903-9337  
325-223-6100  
www.caltech.com  
Brad Giddens (Brad), brad.giddens@caltech.com  
Description: CalTech is a leading provider of technology services for financial institutions. Committed to proactive, efficient solutions, CalTech's Microsoft and Cisco certified technicians can maximize your technology investment by providing full IT support at multiple locations or enhancing the capabilities of your internal IT staff with supplemental support.

Cardinal Software, Inc.  
6700 Pioneer Parkway  
Johnston, IA 50135  
866-232-7436  
www.cardinalsoftwareinc.com  
Mike Corbin (Mike), mcorbin@cardinalsoftwareinc.com  
Description: Cardinal Software serves the community banking industry with a full suite of integrated core and ancillary solutions. Cardinal's ability to efficiently integrate with non-core applications and openness to working with third party vendors means you have the flexibility to select the systems that support your plan for success.

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Minneapolis, MN 55343  
763-235-5321  
www.cfctechnology.com  
Kimberlee Karr (Kimberlee), kkarr@cfctechnology.com  
Description: CFC helps financial institutions strengthen customer relationships and secure new business. In other words, we uncomplicate growth for FIs. How? By providing a seamless, bundled remote deposit capture solution tailored to each FI's specific needs. At CFC, we deliver a complete, managed services package to scale your RDC program.

Columbus Data Services  
5220 Spring Valley Road, Suite 300  
Dallas, TX 75254  
214-276-5731  
www.columbusdata.net  
Rollie Penn (Rollie), rpenn@columbusdata.net  
Description: CDS provides ATM driving and management as well as debit card management services. We create uniquely customized solutions for every client we serve. From full outsourcing to comprehending the latest changes in the payment industry, you can count on CDS to provide the support you need to keep your business profitable.

Computer Service Professionals, Inc. (CSPI)  
805A W Stadium Blvd.  
Jefferson City, MO 65109  
573-635-1281  
www.cspiinc.com  
Chris Lingafelter (Chris), clingafelter@cspiinc.com  
Description: CSPI is now offering Aurora Online Banking in addition to our Aurora imaging products suite. Highlights of our OLB are: mobile banking, mobile check capture, bill pay, ACH generation, wire transfer, payroll, and telephone banking. All Aurora products can be hosted or datacenter.

CoNetrix  
5214 68th Street, Suite 200  
Lubbock, TX 79424  
806-687-8600  
www.conetrix.com  
Kevin Riddles (Kevin), kriddles@CoNetrix.com  
Description: CoNetrix specializes in providing security, compliance, and IT consulting for community banks. Offerings include IT/GLBA Audits; Penetration Testing; Information Security Programs; Managed Network and Security Services; Cloud Hosting; Computer Network Consulting and Support; and tandem software, an innovative suite of online security and compliance management tools for Risk Assessment, Business Continuity Planning, Vendor Management, Information Security Policies, and more.
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Custom Card Systems
16970 Dallas Parkway
Dallas, TX 75001
972-735-0714
www.customcardsystems.com
Patty Fairchild (Patty), patty@customcardsystems.com

Description: Custom Card Systems, Inc., an ABnote Company, is a leading provider of plastic card systems for financial institutions. Since 1983, over 1300 financial institutions successfully use the CCS solution for instant issuing of debit, credit, ATM and gift cards. Our systems fully integrate with all major core and EFT processors.

216
D+H
7046 Brian Drive
Centerville, MN 55038
901-356-9509
www.dh.com
Anthony Chapman (Anthony), Anthony.Chapman@dh.com

Description: Unleash your full potential with D+H's Mortgagebot lending technology solution. Using this end-to-end platform, you're positioned to meet rising consumer demand for online self-serve options, maximize every branch and call center opportunity, increase loan officer efficiency and streamline processing requirements.

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Dell SecureWorks
One Concourse Parkway, Suite 500
Atlanta, GA 30328
www.secureworks.com
Kevin Jordan (Kevin), 214-236-5339, kjordan@secureworks.com
Anne Faulin (Anne), 512-724-1634, afaullin@secureworks.com

Description: SecureWorks is now part of Dell. Dell SecureWorks is recognized as an industry leader, providing world class information security services to help organizations of all sizes to protect their IT assets, comply with regulation and reduce security costs.

410
Datacard Group
1 Inverness Drive East
Englewood, CO 80112
505-681-7440
www.datacard.com
Charlia Pence (Charlia), charlia_pence@datacard.com

Description: Datacard Group's financial instant issuance solutions give banks, credit unions, retailers and other issuers the ability to drive new revenue, differentiate their brand and maximize cardholder convenience in today's highly connected and competitive marketplace. Our truly integrated solutions include industry-leading hardware, the world's #1 instant issuance software, supplies and global support. With over 40 years of experience and 30,000+ implementations worldwide, Datacard Group is the world's best-selling brand of financial instant issuance solutions.

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DBSI, Inc.
6950 West Morelos Place
Chandler, AZ 85226
210-998-9550
www.dbsi-inc.com
J. Kreitz (Tracy), jtkreitz@dbsi-inc.com

Description: For fourteen years DBSI Incorporated has committed to delivering highly efficient, profitable bank branches with a uniquely smarter experience, providing leading edge software solutions, design, construction, project management and innovative technology. Services and support include real estate services, facility maintenance and management through unique software solutions and on-the-ground field services.

319
Dell Inc.
One Dell Way
Round Rock, Texas 78682
512-728-8763
www.dell.com
Denney James (Denney), denney_james@dell.com

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San Antonio, TX 78219
210-242-6123
www.diebold.com
Gary Guerrero (Gary), gary.guerrero@diebold.com

Description: Founded in 1859, Diebold is a global leader of self-service delivery systems, security, software and service for the financial, government, commercial and retail markets. Diebold's key solutions include retail and drive-up banking equipment, branch facility equipment, integrated electronic and physical security solutions and other self-service terminals.

Fi Compliance Solutions
1006 W. 9Th Ave, 2Nd Floor
King of Prussia, PA 19406
610-265-1002
www.erm365.com
Eric Strohl (Eric), estrohl@erm365.com

Description: ERM 365 - Offers banks an integrated platform to manage risk more effectively. Solutions include enterprise risk management, risk monitoring, vendor management, findings & audit management, ALLL/troubled loans, and compliance.

First American Payment Systems, LLC
100 Throckmorton St., Ste. 1800
Fort Worth, TX 76102
817-317-9100
www.first-american.net
Cody Yanchak (Cody), cody.yanchak@first-american.net

Description: First American Payment Systems is a payment processor operating entirely in-house. First American has a diverse product portfolio including: gift card and credit card processing; check and ACH processing; and more. Our customized relationship fits the bank’s vision and extends the same level of support customers receive in your lobby.

First Data
309 N. Rose Road
Memphis, TN 38117
512-493-2500
www.firstdata.com
Jay Carrigan (Jay), jay.carrigan@firstdata.com

Description: Internet-based financial services for retail and commercial financial institutions. By combining transactional functionality with a comprehensive support infrastructure, First Data provides secure internet banking, small business banking, account aggregation, hosting and web services.

FTSI, Inc.
4628 Appleridge Drive
Richardson, TX 75082
817-269-4745
www.ftsius.com
Jim Liggit (Jim), jliggit@ftsius.com

Description: FTSI is the largest independent provider of ATM services for credit unions and community banks in the western region. FTSI offers a comprehensive collection of ATM management solutions including hardware, software, cash services and first and second line maintenance. FTSI connects technology with superior customer service to create turn-key solutions.

Glory Global Solutions
18 Glen Abbey
Abilene, TX 79606
325-725-3979
www.us.glory-global.com
James Robinson (James), james.robinson@us.glory-global.com

Description: Glory works with financial institutions to develop solutions for branch currency handling requirements by using currency recyclers, dispensers and sorters. Glory’s Currency Recycler is a complete cash handling solution which dispenses cash, accepts deposits, sorts and securely stores teller transactions. Productivity increases immediately, while providing cash optimization and cross-selling opportunities.

High Cotton
1405 S. Beltline, Suite 400
Coppell, TX 75019
214-503-6356
www.highcottonusa.com
Kelvan Musgrave (Kelvan), kmusgrave@highcottonusa.com

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Ignite Sales, Inc.
14785 Preston Road, Suite 550
Dallas, TX 75254
972-789-5522
www.ignitesales.com
Barbie Boe (Barbie), bboe@ignitesales.com
Description: Ignite Sales allows banks to improve efficiency ratios, profits and measurements of channel value. Ignite combines a recommendation platform with powerful analytics that matches products to customer eligibility in real-time at the point-of-sale. Through everyday interactions with customers, bank management gains visibility to the potential relationship with each customer.

225
IBT
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512-616-1100
www.ibtapps.com
Mark Dittman (Mark), mdittman@IBTapps.com
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305
March Networks
4109 Rockingham Drive
Raleigh, NC 27609
817-966-4860
www.marchnetworks.com
Glen Good (Glen), ggood@marchnetworks.com
Description: For nearly a decade, March Networks has helped financial institutions around the globe enhance security, reduce losses from fraud and operate more efficiently. The company's Financial Solutions include enterprise-class hybrid video recording and management platforms, high-definition IP cameras, video analytics, fraud detection and prevention applications, and outstanding professional services. These solutions are proven in 450+ financial institutions in more than 50 countries.

200
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I.T. Works
701 N. Post Oak Rd. #600
Houston, TX 77024
713-667-5474
www.itworksite.com
Mark Hawkins (Mark), mhawkins@itworksite.com
Description: I.T. Works is a professional computer network integration company providing hardware, software and engineering support to corporate clients. Our network assessments provide the cornerstone of audit preparation for community banks. Also, our ongoing network maintenance strategy will help ensure the overall productivity of your business.

103
Jack Henry & Associates
663 W. Highway 60
Monett, MO 65708
972-359-5543
www.jackhenry.com
Greg Lensing (Greg),
Description: Jack Henry & Associates, Inc. (Nasdaq: JKHY) is a leading provider of technology solutions and payment processing services primarily for financial services organizations. Its technology solutions serve more than 11,200 customers nationwide, and are marketed and supported through four primary brands: Jack Henry Banking, Symitar, ProfitStars, and iPay Technologies. Visit www.jackhenry.com.

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LoanStreet LLC
155 E 34th St.
New York, NY 10016
917-612-3790
www.loan-street.com
Ian Lampl (Ian), ian.lampl@loan-street.com
Description: LoanStreet is a marketplace that enables the efficient syndication of any sized loan. By automating and standardizing syndication from origination to maturity, institutions can buy, sell, and manage loans directly on LoanStreet. LoanStreet creates a unique marketplace to find new loan generation opportunities and overcome lending constraints.

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www.mearфинancиаль.com
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Description: MEA Financial is a provider of mobile banking solutions to community banks. MEA’s Mobile Access is native mobile technology that provides a superior mobile user experience. MEA’s mobile suite includes: Browser/WAP, iPhone App,
Android App, iPad App, SMS Banking, and Mobile Deposit Capture. MEA currently services over 1000 financial institutions.

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Description: Network Box USA, Inc. managed security services provide comprehensive and effective managed internet security. Integrating all security essentials into a centralized core, your network is monitored, managed, and updated 24 hours a day, year round.

Outsource ATM
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Description: Outsource ATM provides ATM managed services, allowing financial institutions to focus on their core competencies and offload a resource drain. Our partners get the marketing and financial benefits; we take on the risk and regulations, hard costs, headaches, maintenance and management of the ATMs. Own the benefits, not the hardware.

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Description: Passageways is the leading provider of board portals, vendor management, and employee intranet portals for financial institutions. With more than 400 portal customers Passageways has become the number one scalable choice for financial institutions of all sizes. Contact us at 765.535.1882 or www.passageways.com and make Passageways your portal to productivity.

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Description: PrintMail Systems is the leading provider of statement outsourcing to the community banking industry. Our innovative solutions for printed and electronic statements have unmatched integrity and quality control processes, ensuring accuracy while saving banks time and money. With four convenient locations, contact us for a complimentary cost analysis. Visit us at www.PrintMailSystems.com.

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Description: PROFORMANCE solutions: 1) INFO-ACCESS - integrated document imaging, exception tracking, collateral management, contact management, notice generation and event management, 2) INFO-CAPTURE - e-signature and automatic indexing into the document imaging system, 3) Workflow process automation for loan origination, loan operations, loan review groups, deposit operations, etc. PROFORMANCE supports financial institutions throughout the United States.

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Description: PULSE, a Discover Financial Services company, is a leading debit/ATM network, serving more than 4,400 banks, credit unions and savings institutions across the United States. The network links cardholders with ATMs and POS terminals at retail locations nationwide. Through its global ATM network, PULSE provides worldwide cash access for Diners Club and Discover cardholders through hundreds of thousands of ATM locations. The company is also a source of electronic payments research and is committed to providing its participants with education on emerging products, services and trends in the payments industry.

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Description: Resilient Intelligent Networks offers “best of breed” technologies providing networking, data security and IT integration solutions that are customized for your business. We can assist your IT professionals by combining expert assessments and planning with the products and support that achieve the best value proposition for your unique business needs.
TechMecca Exhibitors ■ Company Information

119
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Description: Schwartz & Associates is a Texas law firm that limits its practice to the preparation of documents for residential real estate transactions, including, but not limited to, purchase, interim construction, one time close, Texas Home Equity, and bond loans. Our highly trained staff provides assistance throughout the closing process.

226
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Description: The Security Center of Texas provides service and installation of safes, vault doors, safe deposit boxes, drive-in equipment, bank equipment, access control systems, bank security equipment, used bank equipment and digital video recording systems for financial and banking institutions.

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Description: SHAZAM offers ATM processing services; Visa Check and Debit MasterCard national products including business debit and health savings account (HSA) cards; card authorization services, merchant processing; ACH services and information security solutions. Visit SHAZAM at www.shazam.net.

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Description: Since 1980, SMA Solutions has specialized in enterprise wide automation technology. OpCon, SMA’s cross-platform software, empowers your bank to improve service, streamline operations and reduce IT costs. Automating everything from repetitive tasks to complex and high-risk processes, OpCon delivers increased operational efficiency throughout your financial institution.

220
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Description: New from SNL, SNLBanker is a streamlined solution for internal bank reporting, providing a single source for analyzing the data critical to your bank. Use SNLBanker to understand drivers, trends, and risks on a real-time basis to make data-driven decisions. You’ll spend less time preparing reports and more time acting on the analysis.

124
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Description: Solis’s special focus on community financial institutions has gained us a solid regulatory reputation for keeping our clients compliant and their data safe. We have expertise in both IT and banking, allowing us to be a dynamic partner who understands your business model. We provide hands-on guidance that not only identifies risks but helps you mitigate them. Our solutions include: Information Security Oversight, Remote Deposit Capture Security, Risk Assessment, Vulnerability Assessment, Application Security, Web Application Firewall, Managed IT Services and Cloud Services.

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Description: Supernal Software provides risk management software for financial institutions. Scout, Supernal’s risk management software, is an interactive dashboard that provides the tools for performing and managing GLBA risk assessments, control audits, red flags, vendor management, and Bank Secrecy Act risk assessments. We strive to make risk management easy to understand and our software simple to use.

323
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Description: SWACHA - The Electronic Payments Resource is viewed by our 1,100 members as the key piece in bringing vital electronic payment resources, expertise and education together for financial institutions and companies. SWACHA members will have all the pieces required to stay on top of a continuously changing electronic payments environment.

227
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partners solutions enable us to provide our customers with software, equipment and support to help automate your business process. We have service operations in Texas and Oklahoma. Regional offices in Amarillo, Austin, Dallas and Oklahoma City.

404
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Description: Since 1975, TransFund had been providing ATM driving, debit card processing, and merchant services programs for banks throughout Texas. We offer unique card products and promotions designed to help Texas banks maximize their debit card program profitability.

201
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Description: Unicom Technologies, a managed compliance solutions provider, eliminates information technology compliance worries. Unicom analyzes, protects and validates financial organizations’ data management infrastructure from the network to the application layer to ensure protection of information and compliance with industry standards and regulations.

408
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Description: Verafin: a new generation of Bank Secrecy Act/Anti-Money Laundering and Fraud Detection software. Verafin provides over 500 financial institutions with a flexible, risk-based alternative to the older, rule-based approaches found in other software solutions. Verafin’s features include: customer risk scoring; suspicious activity detection; watch list scanning; case management; compliance reporting; and vendor management.

214
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Description: VSoft Corporation offers core and payment processing solutions that improve service, reduce cost and maximize efficiency for financial institutions. Its solutions provide seamless, real-time, high-volume and high-performance transactions across multiple channels and can be delivered in-house or as an outsourced ASP or SaaS model.

307
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Description: WebEquity is the proven leader in on-demand lending software. More than 790 financial institutions and 20,000 lending professionals use WebEquity to automate and streamline their lending process and reduce operational costs, while making more uniform and profitable credit decisions.

418
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Description: ZixCorp (r) provides easy-to-use email encryption solutions for privacy compliance. As the market leader in email encryption services, ZixCorp protects tens of millions of members in the ZixDirectory, and approximately 100,000 new members are being added every week. ZixCorp provides transparent seamless secure communications with your customers, partners and regulators.

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