

**AMIs - Finding Success in the New Reality of Financial Services  
2010 PPM Conference  
June 27-29, 2010**

**Sunday, June 27, 2010**

|            |   |  |
|------------|---|--|
| 9:00-12:00 | Costing Practices and Methodologies-<br>Scott Wise, CapCo -Bob McDonald,<br>Wells Fargo | Performance Management 101 - Kelly Smith and<br>Dick Ciolli - Kafafian Group         |
| 12:00-1:00 | Lunch   |  |
| 1:00-4:00  | FTP - Jaime Garza, CapCo  | Performance Management 101 Part II - Kelly Smith<br>and Dick Ciolli - Kafafian Group |

**Monday, June 28, 2010**

|             |   |  |                       |
|-------------|---|--|-----------------------|
| 8:00-9:00   | Keynote -Debra Dunn - USAA Federal Savings Bank   |  |                       |
| 9:00-9:15   | Break   |  |                       |
| 9:15-10:00  | Regulatory Changes impact on<br>Profitability- Richard Weissman-DMA                           | Driving Efficiency and Automation in ABC and<br>Profitability - Firstrust Bank & Acorn Systems |                       |
| 10:00-10:15 |   | Break  |                       |
| 10:15-11:00 |   | Customer Profitability Strategies for Success- Brad<br>Dahlman - ProfitStars                   |                       |
| 11:00-11:15 | Break   |  |                       |
| 11:15-12:00 | Vendor Showcase - TBA   | Vendor Showcase - TBA  | Vendor Showcase - TBA |
| 12:00-1:15  | Lunch   |  |                       |
| 1:15-2:15   | The Role of Economic Capital in the<br>Post Crisis Landscape - Shahram<br>Elghanayan, SunGard | Deploying profitability information - Joseph Prunty,<br>CoreProfit                             |                       |
| 2:15-3:00   | Round Table - Role of Economic Capital<br>- Shahram Elghanayan, SunGard                       | Round Table - Deploying profitability Info. - Joseph<br>Prunty, Core Profit                    |                       |
| 3:00-3:15   | Break   |  |                       |

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| 3:15-4:00 | Pricing Loans & deposits for Profitability, To Sell, To Grow Capital, & More - Tom Farin, Farin and Associates | Hiring and Retaining Engaged Employees - DeeDee Myers, DDJ Myers                                      |
| 4:00-4:15 |  | Break   |
| 4:15-5:15 |  | Funds Transfer Pricing: Implementation of Break Funding (Loan Prepayment Fees)/Ben Acosta-Harris Bank |

**Tuesday, June 29, 2010**

|             |  |  |
|-------------|--|--|
| 8:00-9:00   | Keynote - Dick Evans - CEO of Cullen/Frost Bankers, Inc. (CFR)   |  |
| 9:00-9:15   | Break  |  |
| 9:15-10:00  | Scenario Planning and Stress Testing - Orlando Hanselman, Fiserv   | Deploying Transactional Data into Performance Metrics - First Merit and Market-Line            |
| 10:00-10:15 |  | Break  |
| 10:15-11:00 |  | Deploying Dashboards - Jennifer Upton-Commerce Bank  |
| 11:00-11:15 | Break  |  |
| 11:15-12:15 | Top Ten Best Practices at Financial Institutions - Bill Goedken  | Planning for Levers at your Bank - Molly Smith -TUSC   |
| 12:15-1:15  | Lunch  |  |
| 1:15-2:15   | Incentive Comp Plans-Paula Peterson, Commerce Bank   | Build your next branch on the busiest intersection in town- The Internet - Don Shafer, Bankvue |
| 2:15-2:30   | Break  |  |
| 2:30-3:30   | From Back Office to Front Line: Using Bus. Intelligence to create & execute your CRM Strategy - Chris Braccia, Harland Financial Solutions | Customer Value Analysis- Karuna Mukherjea,SAP  |