

# KLARIVIS EXECUTIVE DATA & INNOVATION SUMMIT

## BUILDING A STRATEGIC EDGE WITH DATA

### DAY ONE: SEPTEMBER 28, 2025

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**4:00 PM** Hotel Check-in at The Hotel Roanoke & Conference Center (110 Shenandoah Ave, Roanoke, VA 24016)

**5:00 PM** Pick up at back entrance of The Hotel Roanoke & Conference Center (near Steam Coffee)

**5:15 PM – 7:30 PM** Welcome Reception at The Snyder's

**7:30 PM – 7:45 PM** Transportation back to The Hotel Roanoke & Conference Center

*NOTE: A welcome gift is waiting for you in your room at The Hotel Roanoke, including breakfast vouchers to enjoy at the hotel's restaurant.*

### DAY TWO: SEPTEMBER 29, 2025

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**6:30 AM – 8:00 AM** Breakfast buffet available at The Hotel Roanoke – *Compliments of KlariVis*

**8:00 AM** Shuttle pick up from The Hotel Roanoke to KlariVis Headquarters (110 Franklin Road SW, Roanoke, VA 24011)

*Note: The shuttle will pick you up at the rear entrance of the hotel, just outside Steam Coffee & Eatery.*

**8:15 AM – 8:45 AM** Registration & Networking

**8:45 AM – 9:00 AM** Welcome & Introductions

*Kim Snyder, CEO & Founder, KlariVis*

**9:00 AM – 10:00 AM** Keynote Presentation – **Broken Behaviors, Not Bad Data: The Real Barrier to Impact**

*Jason Henrichs, Chief Executive Officer, Alloy Labs*

Everyone says they want to be “data-driven.” But what if data isn’t the problem? In this provocative keynote, Jason Henrichs challenges the core assumptions that keep community banks from fully unlocking the potential of their data. It’s not the dashboards, the integrations, or the sophistication of your analytics stack – it’s the behaviors, incentives, and culture that undermine execution.

From boardrooms that cling to gut instinct to teams drowning in reports but starved for insight, this talk explores why the real obstacle to impact isn’t bad data – it’s broken behaviors. Learn what it takes to lead a transformation where data actually informs decisions, empowers teams, and delivers measurable outcomes. You’ll leave inspired – and equipped – to break the cycle.

**10:00 AM – 10:45 AM** The CFO’s Playbook: How Bank CFOs Are Using Analytics to Drive Performance

*Beth Beale, Executive Vice President & Chief Financial Officer, Benchmark Community Bank*

*Steven Nutt, Executive Vice Present & Chief Financial Officer, Community National Bank & Trust of Texas*

*Moderator: Jerry Bradley, Chief Product Officer, KlariVis*

As financial complexity and regulatory demands rise, CFOs must go beyond traditional management and use data analytics to drive profitability, manage risk, and optimize performance. Led by experienced bank CFOs, this session explores how advanced analytics is transforming financial strategy and decision-making. Gain expert insights on leveraging data for forward-looking strategies to navigate today’s dynamic banking landscape with confidence.

#### 10:45 AM – 11:00 AM Break

#### 11:00 AM – 11:45 AM Strategy in Action: How Data Drives Executive Decision-Making

*Steve Poynot, President & Chief Operating Officer, Capital Bank*

*Jason Jones, President, Community Financial Services Bank*

*Moderator: Kim Snyder, CEO & Founder, KlariVis*

Join two forward-thinking bank executives for a candid conversation on how they approach strategic planning in a rapidly changing financial landscape – and how KlariVis plays a critical role in turning data into direction. From aligning executive teams around shared goals to making faster, more informed decisions, hear firsthand how these leaders are leveraging data visibility to drive performance, manage risk, and position their institutions for long-term success. Gain practical insights into the role of data transparency in leadership and learn how to build a data-driven culture from the top down.

#### 11:45 AM – 1:00 PM Catered lunch in the KlariVis Kafé

#### 1:00 PM – 2:00 PM You're the Product Boss: Help Steer the KlariVis Roadmap

*Moderator: Jerry Bradley, Chief Product Officer, KlariVis*

At KlariVis, one of our core values is being relentlessly user-centric. Every enhancement, feature, and innovation we deliver is shaped by the voices of our users – including our Client Advisory Board, who plays a critical role in guiding our product direction.

In this interactive session, our Chief Product Officer will share a transparent look at the KlariVis product roadmap – what's new, what's next, and what's under consideration. Then it's your turn to step into the advisor seat. You'll receive "KlariVis Bucks" to allocate across potential future features, casting your vote for what matters most to your institution. Whether it's deeper insights, better workflows, or expanded capabilities, your input will influence how we prioritize what comes next. This is your chance to shape the future of KlariVis – because your voice is the one that matters most.

#### 2:00 PM – 3:00 PM Build vs. Buy: A Jolt of Clarity *(Your afternoon jolt is provided at the espresso martini / coffee bar!)*

*Anthony Ranghelli, Sr. Vice President & Chief Information Officer, Bank of Charles Town*

Enjoy an afternoon pick-me-up at our coffee bar (espresso martini included) as we dive into one of the most debated decisions in tech strategy: build or buy? In this engaging session, a seasoned CIO will walk through the key factors that influence this choice, from speed and scalability to long-term maintenance and innovation. Walk away with clearer insight and maybe a little more energy into what makes the most sense for your organization's future.

#### 3:00 PM – 3:15 PM Break

#### 3:15 PM – 4:00 PM Keynote Presentation – From Insight to Impact: Turning Data Strategy into Business Strategy

*Jay Como, Global Head of Data Governance & Operations, T. Rowe Price*

It's one thing to collect and organize data. It's another to embed it into your bank's strategic engine. In this session, Jay will offer a blueprint for how institutions can translate data strategy into tangible business impact – supporting goals like deposit growth, NIM optimization, and risk mitigation. Jay will share best practices for aligning data efforts with executive priorities, and how banks of any size can execute without overbuilding or overspending.

#### 4:00 PM – 4:45 PM Networking & Demo Opportunities

#### 5:00 PM Transportation to the Taubman Museum of Art (110 Salem Ave., Roanoke, VA)

#### 5:15 PM – 7:30 PM Cocktails & Dinner at Taubman Museum of Art

#### 7:30 PM Shuttle from Taubman Museum of Art to The Hotel Roanoke

## DAY THREE: SEPTEMBER 30, 2025

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**6:30 AM – 8:00 AM** Breakfast buffet available at The Hotel Roanoke – *Compliments of KlariVis*

**8:00 AM** Shuttle pick up from The Hotel Roanoke to KlariVis Headquarters (*Reminder: Bring your luggage with you!*)

*Note: The shuttle will pick you up at the rear entrance of the hotel, right outside Steam Coffee & Eatery.*

**8:15 AM – 8:45 AM** Networking & Coffee with KlariVis

**8:45 AM – 9:00 AM** Tuesday Morning Welcome

*Kim Snyder, CEO & Founder, KlariVis*

**9:00 AM – 9:45 AM** Lending Leadership: Navigating Growth, Risk, and Opportunity

*Raymond Goodrich, Executive Vice President & Chief Lending Officer, Bank of Charles Town*

*Alissa Curry Briggs, Chief Lending Officer, FVCbank*

*Moderator: Gill Hundley, Chief Operating & Risk Officer, KlariVis*

Join a panel of Chief Lending Officers as they discuss the evolving lending landscape and how they're balancing growth goals with risk management. From shifting borrower expectations to data-driven decision-making, this session will offer candid insights into the strategies, challenges, and opportunities shaping the future of lending. Learn how top CLOs are adapting their approach to stay competitive and support their institution's broader strategic vision.

**9:45 AM – 10:45 AM** Keynote Presentation – Exclusive First Look: Financial Institutions' Data EQ (Execution Quotient)

*Ron Shevlin, Managing Director & Chief Research Officer, Cornerstone Advisors*

Be among the first to hear the results of a groundbreaking new study from Cornerstone Advisors and KlariVis. In this exclusive debut presentation, we will unveil findings from *Financial Institutions' Data EQ (Execution Quotient)* – a research initiative exploring how effectively banks are putting their data to work. Far beyond just having data, this session will explore what it takes to execute on it – operationally, strategically, and culturally. Drawing on insights from institutions across the country, we will reveal the key traits of high Data EQ performers, the gaps holding others back, and practical steps leaders can take to improve their own execution quotient.

**10:45 AM – 11:30 AM** Ask & Explore: Open Forum with Peers and Product Experts

Let's wrap up the Summit with an open forum designed for conversation, curiosity, and connection. Whether you have questions for the KlariVis team, want to hear how other institutions are using data in their day-to-day lives, or simply want to explore new ideas before lunch, this session is your space to do just that. No slides, no script – just candid dialogue, shared experiences, and real-time answers. Bring your curiosity and let's talk about what matters most to you.

**11:30 AM – 12:30 PM** Boxed lunches will be available to enjoy before your departure or on your journey home!