



# 6th Annual PeakCon

October 11-13<sup>th</sup>, 2023

The Cornhusker Marriott, Lincoln NE



LOANS



DEPOSITS



AUTOMATION



BSA/AML/FCRM



BPM

Use these icons to help identify breakout sessions that interest you throughout the conference.

## Wednesday, October 11th

12:30-1:30 **Registration** | [Lower Level Foyer](#)

1:30-2:30 **Opening Session, Welcome, Peak Update and Vendor Introductions** | [Lancaster](#)

*Welcome to the 6<sup>th</sup> Annual PeakCon! In this opening session we will introduce the Peak Team, go through the conference packet, and briefly discuss what to expect in the next couple of days. We will also have vendor introductions to kick off the conference.*

2:30-3:15 **Mastering Business Analytics/Excel** | [Lancaster](#)

*In this session we will discuss some of our favorite ways for getting the most out of your reports. Learn how to correctly format reports for any downstream process. We'll even equip you with common query calculations you can start using today!*

3:15-3:45 **Break & Vendor Showcase** | [Lancaster](#)

*Visit each of the 10 vendors, get a sticker on your walk-around card, and turn this in at the completion of the conference for a chance to win a prize!*

3:45-4:15 **Core Release and Industry Update Breakouts** - choose 1 of 4 to attend



Loans  
[Lancaster](#)



Automation  
[Arbor I](#)



Deposits  
[Hawthorne](#)



BPM/FCRM  
[Arbor II](#)

4:15-5:00 **Fiserv Forum Recap and Roundtable** | [Lancaster](#)

*In this session we will discuss some of the topics and new information that were presented at Fiserv Forum 2023. If you missed going to Forum, this will be your opportunity to gather some of the missed information as well as discuss the items with the group. We will get feedback and perspective from a panel of bankers as well as Peak. We will also look for feedback and dialogue from the attendees.*

5:00-7:00 **Cocktail Reception w/ Appetizers - Sponsored by  360view** | [Outdoor Patio Main Level](#)

7:00 **Hospitality Suite Open - Sponsored by Peak Consulting** | [Olive Branch](#)

*This is your evening hot spot for snacks, beverages, and entertainment! Technically, we'll call it "networking." There's always great business conversations, but this session will be more exciting over a crashing Jenga tower with Valentino's pizza (a Nebraska favorite).*

7:30-8:30 **Breakfast and Vendor Showcase I** *Lancaster and Lower Level Foyer*  
Sponsored by: *The Pentas Group*

8:00-8:30 **Vendor Session: The Pentas Group I Lancaster**  
**“Who Loves Contract Negotiations? WE DO!”**



*Working with your core vendor to negotiate your financial institution's contract can be very stressful. Especially if the last time you did it was five to seven years ago. Does your process align with your goals and timing? Do you know if you are getting a fair deal? Should you consider an RFP? We'll probe these questions and more during this interactive session.*

8:30-9:30 **Breakout Sessions (choose 1 of 4 to attend)**



**Escrow Strategies and Analysis Statement Updates I Lancaster**

*There have been a number of changes to the Escrow Analysis statement and escrow specs. We will first discuss the changes and impact to customers/staff. Then we will dive into some best practice techniques to improve escrow disbursements, analysis, test analysis, and more.*



**Deposit Basics - Product, Class, and Integration Specs I Hawthorne**

*In this session we will discuss the basics of setting up new deposit products. We will walk you through the steps to roll out a new product... yes it actually does take 3 days! Bring your own deposit specs for an interactive discussion with true takeaways.*



**RPA v17.13+ Best Practices I Arbor I**

*Changes to the RPA Chrome Extension have allowed us to expand our recommendations for Navigator Targets. Learn how we quickly and reliably create automated scripts.*



**BPM - More than Opening New Accounts I Arbor II**

*In this session we will discuss features and techniques to get the most out of common maintenance processes such as Beneficial Ownership, Owner/Signer Changes, and Address Changes. BPM isn't limited to only opening accounts!*

9:30 - 9:45 **Break & Vendor Showcase**

*Visit each of the 10 vendors, get a sticker on your walk-around card and turn this in at the completion of the conference for a chance to win a prize!*

9:45 - 10:45 **Breakout Sessions (choose 1 of 4 to attend)**



**Product Specs, Loan Specs, and Integration - a helpful overview I Lancaster**

*When was the last time you reviewed your Product or Loan specifications? Are you familiar with the Loan Integration specs? We will go through a high level of these areas and take questions as we go along. We will discuss some of the highlights and opportunities to increase efficiency as you board loans, improve your loan operations environment, and have familiarity with the loan integration so you can make improvements or implement new functionality.*



**Checking Product Restructures for the Next Generation I Hawthorne**

*Looking to consolidate, restructure or even offer new checking products? Come join our session to understand the options available within the system. We will review the details of consumer products including service charges, activity charges and rewards setup. We will also review best practices for how to set up business analysis accounts. Finally, if you are looking to consolidate or restructure, we will discuss things to consider when migrating customers to the new products or best practices when deciding to grandfather in old products.*



**Leveraging Nintex Automation Cloud I Arbor I**

*Learn how to use Nintex Automation Cloud to build end to end automation across your organization. From collecting user inputs via standardized forms, to remotely initiating RPA scripts, all while documenting approvals along the way, this tool has a feature that's sure to help drive efficiency at your institution.*



**From BPM to FCRM - Data Collection and Utilization for BSA I Arbor II**

*Do your users find themselves overwhelmed by the information they are asked to collect and enter when accounts are opened or updated? In this session we will discuss how to review and update BPM & FCRM specifications to get the most out of both applications.*

10:50-11:45



### Vendor Session - Lunch Sponsor Shield Compliance | Lancaster “Cannabis Banking Unlocked”

The U.S. cannabis market is expected to continue its growth in 2023, with projected sales of \$72 billion a year by 2030. Adult-use cannabis programs, now legal in 23 states, are primarily driving this growth. While the legal cannabis industry can help financial institutions find new growth with low-cost deposits, lending, and non-interest income revenue streams, it also presents challenging operational demands and complex regulations. This session will explore the real-world impacts associated with serving this industry and will present insights and perspectives from a panel of experienced cannabis bankers. Topics that will be covered include:

- Building a business case for cannabis banking.
- The nuts and bolts of creating a compliant operational structure.
- Managing key stakeholders, from the board to the regulator.
- The role of technology to reduce risk and improve the customer experience.
- Earning a competitive advantage as the market evolves.

11:45-1:00

### Lunch & Vendor Showcase | Lancaster

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1:00-2:00



### Vendor Session - Gold Sponsor Kinective | Lancaster

2:00-2:15

### Break & Vendor Showcase | Lancaster

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2:15-3:15

### Breakout Sessions - (choose 1 of 4 to attend)



#### Credit Bureau Reporting on Premier with Error Resolution Management | Lancaster

In this session we will discuss many of the unique considerations to credit bureau reporting on the Fiserv Premier® core. What codes need to be defined during new note setup and which do not need to be? What do I do if I have a customer dispute? How can I verify my existing errors and get on top of cleaning up my credit bureau data? What will the system auto-report and when do I need to manually intervene? We will answer these questions and more during this interactive session. Bring your Experian Metric report and your Credit Bureau Detail report (CRM/7210-005) to have direct take-aways for your system.



#### Certificate of Deposits - Renewals and Premature Withdrawals | Hawthorne

Is the current rate environment making you rethink your COD processes? In this session, we will walk through the different fields on a COD and the BPM best practices to make renewals easier. We will also discuss the best way to process transactions for early withdrawals along with the Forfeiture specs.



#### Report Parsing Automation | Arbor I

Want to further leverage your Director Reports? Learn how to parse any text based report and output discrete, filterable data files.



#### FCRM Detection Process Training | Arbor II

In this session we will cover a high-level overview of the processes required for FCRM to generate alerts for the AML and Fraud modules and monitor customer and account risk. You will gain an understanding and awareness of how FCRM ingests data, filters data, reviews for unusual activity, and produces alerts. This session will also focus on specifications and attributes of FCRM that are often overlooked, and best practices for ongoing review.

3:15-3:30

**Break & Vendor Showcase | Lancaster**

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3:30-4:00

**Vendor Session - PrintMail Solutions | Lancaster**



**“Boost your Brand Value. Make a statement with every document and every opportunity.”**

Learn how strategic partners can help your company improve critical documents, helping to maximize brand exposure and professionalism.

4:00-4:15

**Vendor Drawings | Lancaster**

4:15-5:00

**Community Roundtable Discussion | Lancaster**

The Community Roundtable will be a large group discussion with views and perspectives on issues from all areas of the bank. We often benefit from hearing about pain points and feedback from other areas of the bank, in addition to our own. We strategically placed our Community Roundtable leading into the Cocktail Reception so that conversations will continue throughout happy hour and into Friday.

5:00-7:00

**Cocktail Reception w/ Appetizers - Sponsored by  nintex | Outdoor Patio Main Level**

7:00

**Hospitality Suite Open - Sponsored by Peak Consulting | Olive Branch**

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## Friday, October 13th

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8:00-9:00

**Breakfast | Lancaster and Lower Level Foyer**

9:00-9:10

**Final Announcements | Lancaster**

9:10-10:00

**Peak Client Spotlight - Name & Address Clean Up | Lancaster**

Join Dan De Jager from Farmers & Merchants Union Bank for a showcase of their recent Name & Address Clean-Up Project! Discover how multiple teams at Peak were able to help optimize BPM, standardize CIF records, and automate the clean-up effort. Additionally, we'll discuss how the project deliverables assist with ongoing maintenance.

10:00-10:15

**Break**

10:15-11:00

**Roundtable Sessions (choose 1 of 3 to attend)**



**Loans | Lancaster**



**Deposits, BPM, & FCRM/BSA | Hawthorne**



**Automation & Reporting | Arbor |**