**SCB Forums – Commercial Banking Agenda**

Hotel AKA Boston Common, Boston, MA – May 6 – 7, 2024

(Casual attire; jeans welcome)

**Sunday, May 5th**

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| 5:45 PM  | Meet Anat in the Lobby. Anat’s mobile: (916) 717-1710 |
| 6:00 PM | Optional dinner offsite.\* |

**Monday, May 6th**

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| 7:30 AM | Breakfast |
| 8:00 AM | Roundtable Discussion* Using sales force and other tools to improve RM productivity and sales management
* Your views on the economy
* Discuss an example of what not to do (disasters)
* Bring questions you’d like to ask
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| 10:00 AM | Break |
| 10:15 AM | Discussion continued |
| 12:00 PM | Lunch |
| 1:00 PM | Follow up on Salesforce CRM topic + enhancing usage / maximization |
| 2:00 PM | Understanding the impact of non-bank competitors – ie FinTechs / P/E etc… |
| 3:30 PM | Adjourn |
| 5:30 PM | Meet in the lobby |
| 6:00 PM | Dinner offsite.\* |

**Tuesday, May 7th**

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| 7:30 AM | Breakfast – Topics for the next meeting |
| 8:00 AM | Pricing for business relationships against FinTechs |
| 9:00 AM | Changing expectations of regulators |
| 9:45 AM | Break |
| 10:00 AM | Is your deposit strategy working: why or why not?  |
| 11:00 AM | Talent management |
| 12:00 PM | Adjourn |

\*Guests are welcome.