

2024 AGENDA

**INSIGHTS &
INNOVATION**



*A Buy Now, Pay Later Summit
for Financial Institutions*

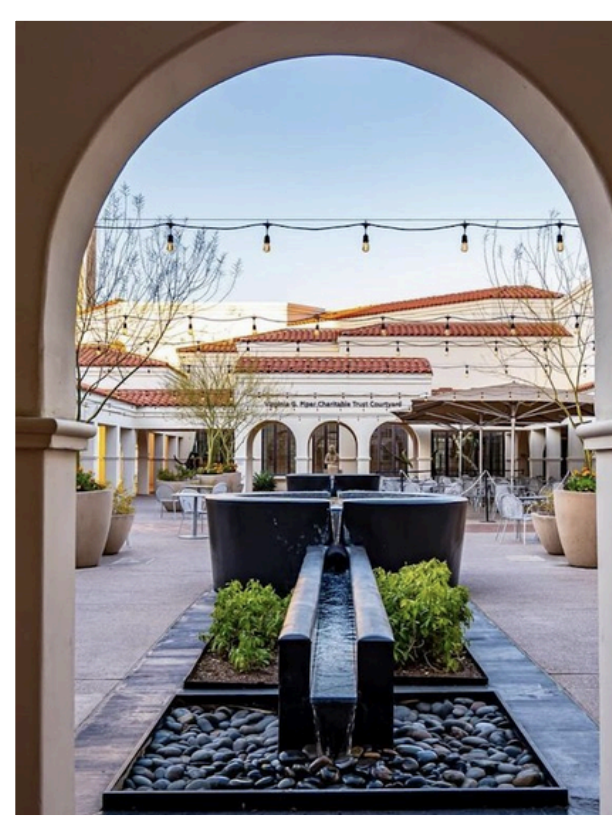


Meet with experts, learn about best practices, and share your stories with other financial institutions that have successfully launched Buy Now, Pay Later programs.

2024 Insights and Innovation, a fully hybrid experience

equipifi's BNPL Insights & Innovation Summit is back! Last year, over 100 attendees from more than fifty forward thinking financial institutions came together to learn about how Buy Now, Pay Later can impact the digital banking experience.

This year, this experience is fully hybrid. Taking place both in person and digitally (each with its own unique programming), this summit is curated to provide you with timely BNPL content no matter how you choose to attend.



ATTENDING IN PERSON IN ARIZONA

The Heard Museum

Attending the BNPL Summit in person? Come join us at our in-person event at The Heard Museum. The venue is only 10 minutes from downtown Phoenix by car or light rail, and all attendees are welcome to tour the museum for free before the event.

WHEN: October 6, 2024 1PM-4PM,
with post event social until 6PM

WHERE: 2301 N. Central Ave. Phoenix, AZ 85004

After the event, stay tuned for recordings from our Digital Summit and press play on our Masterclass Menu for deep dives from our subject matter experts.



Attending the Digital Summit

Can't make it in person? Join us virtually for our Digital Summit. With unique content designed for an impactful hour-long live webinar, the Digital Summit is an action packed event full of exciting speakers and engaging sessions.

WHEN: October 16, 2024 1PM-2PM EST

All key sessions and panels from our in-person event will be made available to virtual attendees after the Digital Summit ends. Virtual attendees will also receive access to our Masterclass Menu to watch additional content on demand.



Masterclass Menu on Demand

Some subject matters deserve a deeper dive. That's why we're providing a Masterclass Menu for those who want to learn even more.

Available to all BNPL Summit attendees post event, the Masterclass Menu brings together pre-recorded sessions for you from regulatory experts, eCommerce mavens, industry analysts, and so much more.

Watch them all on demand!



Agenda



In Person Event

October 6th, 1-4PM PST

Welcome Note

Event Keynote

Ron Shevlin, Cornerstone Advisors

BNPL State of the Union

Bryce Deeney, equipifi

[Panel] Innovation, Community, and Growth with BNPL

Tansley Stearns, Community Financial CU

Eric Givens, Arizona FCU

Jessica Hernandez, Generations FCU

Host: John San Filippo, Finopotamus

[Panel] How to Optimize BNPL for Elevated Adoption, Experience, and Success

Eilene Markus, ACU of Texas

Michael Shoaf, Sunwest CU

Sara Plothow, Westmark CU

Host: Lo Smith, equipifi

The Future of BNPL

Danny Mecca, Head of Product of equipifi

Post Event Social 4-6PM PST

Digital Summit

October 16th, 1-2 PM EST

BNPL State of the Union

Bryce Deeney, equipifi

Ahead of the Curve Through Innovation

Indira Khan, Suffolk CU

Meeting Account Holders Where They Are

Jamie Walls, USF FCU

Curating a Seamless Experience

Shannon Johnson, West Community CU

Masterclass Menu

On Demand (More TBA)

The Courage to Innovate

Paul Watkins, (former) CFPB

eCommerce Lessons for Digital Banking

Jazzy Zhu, equipifi

Evolving with the Digital Experience

Pat Scherz, equipifi

Creating Opportunities for Delight

Michelle Wilkinson, equipifi

Speakers



Ron Shevlin
Chief Research Officer at
Cornerstone Advisors



Paul Watkins
Former Director of Office of
Innovation at Consumer
Financial Protection Bureau



Tansley Stearns
president & ceo at Community
Financial Credit Union



Sara Plathow
Chief Consumer Lending
Experience Officer at
Westmark Credit Union



Eric Givens
SVP of Research &
Development at Arizona
Financial Credit Union



Indira Khan
SVP Consumer & Mortgage
Lending at Suffolk Credit Union



Jessica Hernandez
SVP of Operations at
Generations Federal Credit
Union



Jamie Walls
Senior Director of Consumer
and Commercial Lending /
Card Services at USF Federal
Credit Union



Shannon Johnson
Asst. Vice President of Digital
Engagement at West
Community Credit Union



Eilene Markus
Senior Vice President of
Support Lending at ACU of
Texas



John San Filippo
Co-Founder at Finopotamus



Michael Shoaf
Chief Lending Officer at
SunWest Credit Union

ATTENDEES



BNPL Insights and Innovation

equipifi's BNPL Summit is an annual exclusive event for banks and credit unions unlocking their own solution for their account holders. Featuring industry research, best practices from financial institutions, and equipifi's proprietary insights, the BNPL Summit is designed to make the most relevant content accessible to attendees. To register for or to learn more about the event, visit www.equipifi.com/insights-and-innovation-registration-2024.

Register Today

[https://www.equipifi.com/
insights-and-innovation-registration-2024](https://www.equipifi.com/insights-and-innovation-registration-2024)

