2024 AGENDA



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.



The Heard Museum

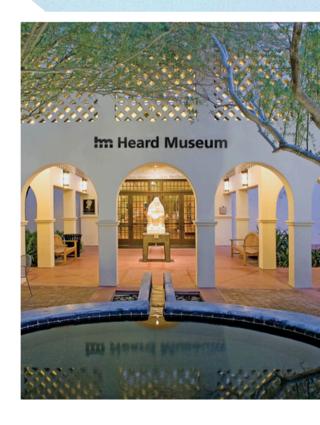
Attending the BNPL Summit in person? Come join us at our in-person event at The Heard Museum. The venue is only 10 minutes from downtown Phoenix by car or light rail, and all attendees are welcome to tour the museum for free before the event.

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 Courage to Innovate

Paul Watkins, (former) CFPB

The Future of BNPL

Bryce Deeney, 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

The Courage to Innovate

Paul Watkins, (former) CFPB

The Future of BNPL

Bryce Deeney, equipifi

Masterclass Menu (Partial)

On Demand

Understanding BNPL through an FI Lens

Ron Shevlin, Cornerstone Advisors

BNPL Consumer and Retail Insights

Melissa Daniels, Modern Retail



Speakers 7



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 Plothow 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 Services at ACU of



John San Filippo Co-Founder at Finopotamus



Michael Shoaf
Chief Lending Officer at
SunWest Credit Union

ATTENDEES





















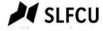


























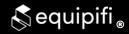












BNPL Insights and Innovation

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



