



A Stifel Company

KEEFE, BRUYETTE & WOODS

14TH ANNUAL

FINTECH & PAYMENTS CONFERENCE

NEW YORK CITY • FEBRUARY 27-29, 2024

Tuesday, February 27

7:30 AM	Registration & Breakfast	
8:00 AM	Jack Henry & Associates (JKHY) <i>David Foss, Board Chair & CEO</i>	
8:45 AM	Mastercard Incorporated (MA) <i>Jorn Lambert, Chief Digital Officer</i>	
9:30 AM	American Express Company (AXP) <i>Christophe Le Caillec, CFO</i>	
10:15 AM	Visa, Inc. (V) <i>Chris Suh, CFO</i>	
11:00 AM	Capital One Financial Group (COF) <i>Richard Fairbank, CEO & Andrew Young, CFO</i>	
Networking Round Robin Luncheon from 11:30am – 1:30pm		
11:55 AM	A Perspective from Industry Consultants <i>Inderpreet Batra-BCG, John Grund-GateOne Group & Andrew Dresner-McKinsey</i>	Nium <i>Michael Bermingham, Co-Founder & Chief Business Officer</i>
12:40 PM	WEX, Inc. (WEX) <i>Melissa Smith, CEO</i>	Pet Insurance: A Dive into Protection & Partnerships <i>Companion Protect, Wagmo</i>
1:25 PM	Bread Financial Holdings (BFH) <i>Perry Beberman, CFO & Val Greer, CCO</i>	Unlocking Distribution with Embedded Insurance <i>Bindable, Coverdash</i>
2:10 PM	A Fintech Conversation with Matt Harris <i>Partner at Bain Capital Ventures</i>	Wealthfront <i>Alan Imberman, CFO</i>
2:55 PM	Fiserv (FI) <i>Frank Bisignano, President & CEO</i>	CoreLogic <i>Jay Kingsley, President</i>
3:40 PM	Forces Shaping Payments Processing & The Road Ahead <i>Lightspeed, Nuvei (NVEI)</i>	<i>No Presentation at this time</i>
4:30 PM	Cocktail Reception	



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Wednesday, February 28

8:00 AM	Registration & Breakfast	
8:45 AM	Bank Tech <i>DocFox, MANTL, Numerated</i>	Under the Hood in eComm Payments Processing <i>Vish Shastry</i>
9:30 AM	Creeping Regulatory Threats to Global Payments Industry <i>Lindsey Johnson, Judith Rinearson & Tom Brown</i> Moderator: Eric Grover	Trends In Mortgage Technology <i>Blend Labs (BLND), Boston Consulting Group, Flagstar Bank (FBC)</i>
10:15 AM	Update on FedNow Rollout & Implications for Payments Systems <i>Allison Baller, VP & Head of Industry Readiness</i>	Property Data & Analytics <i>Altus Group, Point, Roofstock</i>
11:00 AM	Upgrade <i>Renaud Laplanche, Co-Founder & CEO</i>	Consumer Marketplace <i>Moneylion, PicPay, Step</i>
Networking Round Robin Luncheon from 11:30am – 1:30pm		
11:55 AM	The Bancorp (TBBK) <i>Damian Kozlowski, President & CEO</i>	Sell-Side Readiness & Exit Preparation <i>Crosslake Technology, CVC, L.E.K Consulting</i>
12:40 PM	Evolution from TradFi to Tokenization <i>Figure</i>	Introduction: IG Group (IGG LN) & Agrolend <i>(IG 12:40 – 1:00) (Agrolend 1:00-1:20)</i>
1:25 PM	Institutionalization of Digital Assets <i>Fireblocks, Galaxy Digital</i>	Consumer Lending Enablement <i>Amount, Better</i>
2:10 PM	Decentralized Finance <i>Exodus, Securitize</i> Moderator: Omid Malekan	Navigating the Changing Landscape of Consumer Finance <i>Atlanticus Holdings, goeasy, SunBit</i>
2:55 PM	A Sit-Down with Nigel Morris, Co-Founder QED Investors	The Future of Finance <i>Biz2Credit, Bluevine, Lendio</i>
3:40 PM	Bill Pay Innovation <i>BillGO, Finexio</i>	Anti Fraud & Financial Crime Technology <i>ComplyAdvantage, Feedzai, HAWK:AI</i>
4:25 PM	ISVs (Vertical Software) <i>Fullsteam, NMI, Nomi Health</i>	Next Generation Application Security <i>Datadome, Human Security, ThreatX</i>
5:05 PM	Cocktail Reception	



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Thursday, February 29

8:00 AM	Registration & Breakfast	
8:45 AM	The Evolution – BaaS to Embedded Banking <i>Evolve B&T, Grasshopper, Thread Bank</i>	Mortgage Servicing Technology <i>a360, Consolidated Analytics, Haven, Indecomm</i>
9:30 AM	Embedded Finance <i>Treasury Prime, Unit</i>	Wealthtech: Enabling the Advisor & Improving the Client Experience <i>Earned, OneVest</i>
10:15 AM	Digital Lending <i>Propel Holdings, Reprise Financial, Sezzle</i>	The Next Generation of Retail Investing Platforms <i>TradeZero, WeBull</i>
11:00 AM	Don't Be a BaaS <i>Finwise, Versa Bank</i>	Pagaya (PGY) <i>Gal Krubiner, Co-Founder & CEO</i>
Networking Round Robin Luncheon from 11:30am – 1:30pm		
11:55 AM	Modern Issuing for the Gig Economy <i>Payfare, i2c</i>	Upstart <i>Sanjay Datta, CFO</i>
12:40 PM	Spend Management – The Future of the Office of the CFO <i>Mesh Payments, Speedchain</i>	Can FinTech Solve the Retirement Savings Crisis? <i>Betterment, Vestwell</i>
1:25 PM	Embedded Finance / B2B <i>Boost Payments, LiftForward, Priority Technology Holdings</i>	Deposit Optimization <i>Kasasa, Prizepool, StrategyCorps</i>
2:10 PM	Bank Tech – Deposit Management <i>ModernFi, Reich & Tang, StoneCastle</i>	OakNorth <i>Hugh Shannon, Head of Sales & Customer Success</i>
2:55 PM	Modern Digital Cores <i>Narmi, NYMBUS</i>	Everybody Needs Alternatives <i>Halo Investing, OurCrowd, Yieldstreet</i>
3:40 PM	Adjournment	



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a360	Companion Protect	GrailPay	ModernFi	Sezzle (SEZL)
Agent IQ	Confidence	Green Dot Corporation (GDOT)	Mogo	SitusAMC
Agrolend	Consolidated Analytics	Halo Investing	MoneyLion (ML)	Speedchain
Allegiance Merchant Services	Core10	Haven Servicing	MVB Bank (MVBF)	
Ally Financial Inc (ALLY)	Corecard	Hawk:AI	Narmi	Step
Altus Group (TSE: AIF)	CoreLogic	i2c	Ninth Wave	StoneCastle Partners
American Express Company (AXP)	CorServ	iCreditWorks	NMI	StrategyCorps
Amount	Coverdash	IG Group (IGG LN)	Nomi	Sunbit Payments
Atlanticus Holdings	Crosslake Technologies	Indecomm	Numerated	Symphony
Avant	Customers Bank (CUBI)	IQPay, Inc.	Nymbus	Tassat
Axletores Solutions	DocFox	Jack Henry & Associates, Inc. (JKHY)	OakNorth	The Bancorp (TBBK)
Azimuth	Earned	Jaris	OneVest	Thread Bank
Bain Capital	Episode Six	Jifiti	OurCrowd	TradeZero
	Evolve B&T	Kalepa	Pagaya (PGY)	Treasury Prime
Bead Pay	Exodus (EXOD)		Pathward	Triumph Financial, Inc. (TFIN)
Better (BETR)	Figure	Kasisto	Payfactory	True Digital
Betterment	Finexio	LendingTree (TREE)	Payfare (PAY.CN)	Upgrade
BILL (BILL)	FinFit	Lendio	PayMaple	Upstart
BillGO	Finix Payments	LiftForward	PayPal Corp Dev	VEF (VEFAB SS)
Bindable	FinWise (FINW)	Lili Banking	PicPay	Versa Bank
Biz2Credit Inc.	Fireblocks	Lincoln Savings Bank	Pockyt	Vested
Bluevine	Fiserv (FI)	Live Oak Bank (LOB)	Point	Vestwell
Boost Payments	Flagstar Bank (FBC)	LMAX Group	Prelim	Visa, Inc. (V)
Bread Financial Holdings (BFH)	Flutterwave	MANTL	Priority Technology Holdings (PRTH)	Wagmo
Bydcash	Forter	Mastercard (MA)	PrizePool	Wealthfront
Capital One Financial Corp (COF)	FP Omni Technologies	Matic	Propel Holdings (TSX: PRL)	WeBull
Celtic Bank	Fullsteam	McKinsey	Reprise Financial	WEX, Inc. (WEX)
CheckAlt	Galaxy Digital (GLXY)	Merchant's PACT	Roofstock	Yieldstreet
Coastal Financial Corp (CCB)	Gate One Group	Merrco Payments	Securitize	Zero Hash
	goeasy (TXS:GSY)	Mesh Payments		