



A Stifel Company

KEEFE, BRUYETTE & WOODS
FINTECH & PAYMENTS CONFERENCE

NEW YORK CITY • FEBRUARY 28 – MARCH 2, 2023

Tuesday, February 28, 2023

NYC		
7:30 AM	Registration & Breakfast	
8:00 AM	Synchrony Financial (SYF) <i>Brian Doubles, President & CEO and Brian Wenzel, CFO</i>	
8:45 AM	Taking Stock of the Payments Landscape – A Perspective from Industry Consultants <i>Inderpreet Batra, BCG and Andrew Dresner, McKinsey</i>	
9:30 AM	Mastercard Incorporated (MA) <i>Sachin Mehra, CFO</i>	
10:15 AM	American Express Company (AXP) <i>Jeff Campbell, Vice Chairman & CFO</i>	
11:00 AM	SoFi Technologies Inc (SOFI) <i>Christopher LaPointe, CFO</i>	
11:40 AM	Networking Round Robin Luncheon	
	Track 1	Track 2
12:40 PM	European Spotlight: An Introduction to LMAX Group & VEF <i>VEF (12:40 – 1:00pm), LMAX Group (1:00 – 1:20pm)</i>	BREX <i>Marco Ronning, Head of Corporate Development</i>
1:25 PM	Bread Financial Holdings (BFH) <i>Perry Beberman, EVP & CFO</i>	Insurtech Intros <i>Cover Whale (1:25-1:45pm), Covered (1:45-2:05pm)</i>
2:10 PM	FLEETCOR Technologies Inc. (FLT) <i>Alissa Vickery, Interim CFO</i>	International Spotlight: An Introduction to Tingo & Agrolend <i>Tingo (2:10-2:30), Agrolend (2:30-2:50)</i>
2:55 PM	Trumid <i>Mike Sobel, Co-CEO & President</i>	Private Label & BNPLs WORKSHOP: State of Affairs and Future Trends <i>John Grund, GateOne Group</i>
3:40 PM	B2B Payments – The Next Generation <i>Boost Payments, PaymentWorks, Priority Technology Holdings (PRTH)</i>	<i>No presentation at this time</i>
4:15 PM	Cocktail Reception	



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Wednesday, March 1, 2023

NYC

7:30 AM	Registration & Breakfast	
8:00 AM	WEX, Inc. (WEX) <i>Melissa Smith, CEO</i>	
8:45 AM	Visa Inc. (V) <i>Ryan McInerney, President & CEO</i>	
9:30 AM	Discover Financial Services (DFS) <i>Dan Capozzi, EVP, President – U.S. Cards</i>	
10:15 AM	Jack Henry & Associates (JKHY) <i>David Foss, Board Chair & CEO</i>	
11:00 AM	PayPal Inc. (PYPL) <i>Doug Bland, Head of Consumer Business</i>	
11:40 AM	Networking Round Robin Luncheon	
	Track 1	Track 2
12:40 PM	The Next Frontier for Integrated Payments & Payfac <i>Infiniccept, Payroc</i>	Digital Lending – Moving at the Speed of Customers <i>Avant, Atlanticus, LendingPoint</i>
1:25 PM	Alternative Payments <i>Dwolla, Link, Pockyt</i>	Technology is Redefining KYC, Risk & Fraud Management <i>FeatureSpace, Neuro-ID, Prove, TokenEx Inc.</i>
2:10 PM	LendingClub Corp (LC) <i>Scott Sanborn, CEO</i>	The Future of Mortgage Finance <i>Boston Consulting Group, Parker89, Stone Point</i>
2:55 PM	Unique Distribution Channels to Access Capital: KBW / Stifel Platform <i>Paul Del’Isola, Laura Hickman, Zeeshan Memon, Paul McCaffery</i>	<i>No presentation at this time</i>
3:40 PM	Galaxy Digital <i>Chris Ferraro, Co-President</i>	Proptech: Why Investors Should Care – A VC Perspective <i>Fifth Wall, MetaProp, Rice Park Capital</i>
4:25 PM	The Future of Crypto <i>Bakkt, Crypto.com, Fireblocks, Galaxy</i> <i>Moderator: Omid Malekan</i>	Modern Card Issuing <i>CoreCard, i2c</i>
5:05 PM	Cocktail Reception	



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NEW YORK CITY • FEBRUARY 28 – MARCH 2, 2023

Thursday, March 2, 2023

NYC

7:30 AM Registration & Breakfast		
	Track 1	Track 2
8:00 AM	The Evolution of Banking-as-a-Service <i>Coastal Financial Co (CCB), Evolve B&T, Synctera, Unit</i>	Technology Enablement in the Fire Sector <i>StoicLane</i>
8:45 AM	Banktech Enablement... Opening Digital Banking to All? <i>Doc Fox, Mantl</i>	Fintech PE <i>Bregal Sagemount, Centana Growth, Lightyear, Ten Coves</i>
9:30 AM	Specialized Commercial Banks <i>OakNorth Bank, NewtekOne Inc., VersaBank</i>	An Introduction to True Digital Group <i>Patrick Sells, Co-Founder</i>
10:15 AM	Specialist PE <i>Canapi, JAM Fintop, Mendon Capital Ventures, Patriot Financial Partners</i>	Leveraging Technology in Specialty Lending <i>Fora, Sunbit, YieldStreet</i>
11:00 AM	Redefining Payments Infrastructure <i>Gr4vy, NMI, Tilled</i>	An Introduction to One Inc. & Mesh Payments <i>One Inc. (11:00-11:20) & Mesh Payments (11:20-11:40)</i>
11:40 AM Networking Round Robin Luncheon		
12:40 PM	Tokenizing Real World Assets <i>Customers Bancorp Inc. (CUBI), Tassat, Wisdom Tree</i>	Point of Sale Finance: What's the Next Move? <i>ClearBalance, iCreditWorks, Jifiti</i>
1:25 PM	The Future of Banking-as-a-Service <i>Ninth Wave, Stride Bank, Treasury Prime</i>	Evolution of Mortgage Point of Sale Solution <i>Blue Sage Solutions, Cloudvirga, Roostify</i>
2:10 PM	Bank Tech – Modernizing Banking Products <i>Kasasa, Narmi, Nymbus</i>	How Technology is Transforming Risk Management & Regulatory Compliance <i>Asurity, Azimuth, Compliance.ai</i>
2:55 PM	Bank Tech – Digitization of Commercial Banking <i>Bluevine, Lili, Numerated</i>	Lending as a Service – The New Way to Originate <i>Biz2Credit, Momnt, OakNorth Bank</i>
5:05 PM Adjournment		

Companies hosting small group meetings only: Evertec Inc (EVTC), Payoneer



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Participating Companies

99Fintech	Coinfirm	iCreditWorks	Numerated	Stride Bank
Able AI	Compliance.ai	Infiniccept	Nymbus	Sunbit
Agent IQ	Computershare	Ingo Money	OakNorth	Synchrony Financial (SYF)
Agrolend	CoreCard	Jack Henry & Associates, Inc. (JKHY)	Onbe	Synctera
Ahoy	Covered	JAM Fintop	One Inc.	Tassat
American Express Company (AXP)	Cover Whale	Jifiti	Parker89	Tencoves
Allegiance Merchant Services	Crypto.com	Kasasa	Patriot Financial Partners	Thread
Apple Commerce	Customers Bancorp (CUBI)	KEO WORLD	PaymentWorks	Tilled
Asurity	Cysurance	Lama AI	Paynetworx	Tingo
Atlantacus	DailyPay	LendingClub Corp (LC)	Payoneer	TokenEx, Inc
Avant	Discover Financial Services (DFS)	LendingPoint	PayPal Inc. (PYPL)	Treasury Prime
Azimuth	DocFox	Life Wallet (LIFW)	Payroc	Triumph Financial, Inc (TFIN)
Bakkt	Dwolla	Lili	Pockyt	True Digital Group
Biz2Credit	Easy Knock	Lincoln Savings Bank	Ponto	Unbanked
Blankfactor	Edenred	Link	Posh	Unison
Blue Sage	Equitus Corporation	LMAX Group	Prelim	Unit
Bluefin	Evertec Inc (EVTC)	Mantl	Priority Technology Holdings Inc (PRTH)	VEF
Bluevine	Evolve B&T	Marstone	PrizePool	VersaBank
Boost Payments	FeatureSpace	Mastercard Incorporated (MA)	Prove	Visa Inc. (V)
Boston Consulting Group	Fifth Wall	McKinsey & Company	Rice Park Capital	Volly
Bread Financial Holdings, Inc. (BFH)	Finexio	Mendon Capital Ventures	Roostify	Waystar
Bregal Sagemount	Finstro	Mesh Payments	SecFi	WealthAgile
BREX	Fintanium	MetaProp	Snapsheet	WEX, Inc. (WEX)
Canapi	Fireblocks	Micro Strategy	SoFi Technologies Inc (SOFI)	White Clay
Carver Edison	FleetCor Technologies Inc. (FLT)	Momnt	Stewart Title	Wisdom Tree
Centana Growth	FloatMe	MoneyLion	StoicLane	YieldStreet
Chain Reaction	Fora	Narmi	Stone Point	
CheckAlt	Galaxy Digital	Neuro.Id	StoneCastle/CAMBR	
Checkout.com	GateOne Group	NewtekOne Inc	Strategic Financial Solutions	
Clear Balance	Gr4vy	Ninth Wave		
Cloudvirga	Green Dot Corporation (GDOT)	NMI		
Coastal Financial Co (CCB)	i2C			