

The Road Ahead

September 24-26, 2008 New York City

INNO VA TICN08

AGENDA

All sessions except the highlighted Wealth Management Sessions will be held in the Hudson Ballroom. Other sessions will be held in the rooms indicated below.

Wednesday, September 24, 2008

4:00 - 8:00 p.m.	Registration and Check-in – Embassy Suites
6:30 - 8:30 p.m.	Welcome Cocktail Reception – SouthWest NY / World Financial Center

Thursday, September 25, 2008

8:30 - 9:00 a.m.	Continental Breakfast / Registration		
9:00 - 9:45 a.m.	The Road Ahead: Welcome and Keynote Address by Sanjeev Dheer, CEO & President, CashEdge		
9:45 - 10:25 a.m.	Evolution of the Payments Landscape by Tim Mills, Senior Expert, Global Concepts		
10:25 - 10:40 a.m.	Break		
10:40 - 11:10 a.m.	CashEdge Brokerage and Wealth Management Vision		
11:10 - 11:40 a.m.	Realizing the Potential of Intelligent Money Movement: New CashEdge Services		
11:40 - 12:10 p.m.	Managing Risk Effectively Across all Money Movement Services		
12:10 - 1:15 p.m.	Lunch		
1:15 - 2:00 p.m.	Leveraging Alternative Payment Methods to Attract Profitable Customers by Beth Robertson, CCM, Independent Payments Consultant		
2:00 - 2:30 p.m.	Aggregation Product Road Map and Operational Update	Making it a Reality: Implementing Consumer Third-Party Transfers and Small Business Me-to-Me Transfers	
2:30 - 2:45 p.m.	Break		
2:45 - 3:15 p.m.	Financial Advisor Panel: Using Aggregation to Increase Assets Under Management (Greenwich Room)	Beating the Fraudsters: Utilizing Knowledge-Based Authentication to Prevent Fraud in Money Movement; Featuring a Wachovia Case Study by Nancy Parzych, VP of E-Commerce and Online Payment Services	
3:15 - 3:45 p.m.		A Peek Inside the Cage: A Review of CashEdge's Risk Tools and How They Help to Manage and Mitigate Risk One Transaction at a Time	
3:45 - 4:15 p.m.	Aggregation Roundtable for Financial Advisors (Washington Room)	Aggregation Roundtable for Enterprises (Liberty Room)	OpenNow/FundNow – Market Trends and Product Update
4:15 - 6:00 p.m.	CashEdge Product Pavilion and Enrichment Session		
6:15 p.m.	Evening Social Event – Board Buses for Ellis Island Museum		

Friday, September 26, 2008

8:30 - 9:00 a.m.	Continental Breakfast		
9:00 - 9:40 a.m.	Capturing Customer Loyalty Through Mobile Banking Services by Eskander Matta, SVP, Diversified Channels and Products, Internet Services Group, Wells Fargo		
9:40 - 10:10 a.m.	Tapping the Lucrative Small Business Market		
10:10 - 10:30 a.m.	Break		
10:30 - 11:10 a.m.	Client Case Study: TransferNow: Deploying Consumer Third-Party Transfers by Jaylene Tsukayama, VP & Manager, Home Banking Department, First Hawaiian Bank		
11:10 - 11:50 a.m.	Surfing the Web with Consumers and the Implications for Banks by Brian Jurutka, VP, comScore		
11:50 - 12:00 p.m.	Conference Closing by Sanjeev Dheer		