

**FSTC 2007 Annual Conference:**  
*Moving Financial Services Toward Resiliency, Mobility,  
and Security*

**Hyatt Regency Dallas**  
May 16-17, 2007



**SPONSORED BY:**



**Tuesday, MAY 15**

- 9:00 am- 10:00 am Exhibits and Registration Open – Coffee Served
- 10:00 am – 5:00 pm FSTC Team Meetings
- Resiliency Maturity Ph-3 Project meeting
  - Enterprise Architecture Standing Committee
  - Security Standing Committee
- 12:30 pm-1:30 pm Luncheon Keynote: The Next Steps in Security and Mobile Payments  
Speaker: TBA, Microsoft Corporation
- 5:00 pm-6:00 pm **The Mixer**  
Mobile Payments Workshop attendees and Annual Conference attendees converge in the FSTC's Solution Provider pavilion for good cheer and good contacts for the best solutions.

**WEDNESDAY, MAY 16 FSTC 2007 ANNUAL CONFERENCE**

- 7:30 am–6:00 pm Registration
- 7:30 am–8:15 am Continental Breakfast

**8:15 am-9:15 am**

**Welcome and Introductions:**

- Dan Schutzer, Executive Director, FSTC
- Tom Vicknair, Senior Vice President, JP Morgan Chase

**Emerging Financial Services: Trends and Growth In Payments**

- Kausik Rajgopal, Partner, Payment Systems, McKinsey

**9:15 am-10:15 am**

**The Value Proposition of a Multi-Disciplinary Approach**

- **Business Continuity:** Randy Till, Mastercard and Marty Plevel, KPMG
- **Security:** Marie Van Cleave, US Bank and Mike Versace, Fidelity
- **Enterprise Architecture:** Stewart Parbery, Bank of America
- **Moderator:** Dan Schutzer, Executive Director, FSTC

**10:15 am–10:35 am**

**Coffee Break**

**10:35 am-11:30 am**

**The Mobile Ecommerce Revolution and Gen Y**

- TBA, Microsoft Corporation
- Drew Sievers, CEO & Co-Founder, Mfoundry
- Penny Gillepie, Gillepie International
- Moderator, John Fricke, FSTC Chief of Staff

**10:35 am-11:30 am**

**Information Security: A Critical Competency**

- Bill Wilson, Director – CERT, Carnegie Mellon

**11:35 am -12:15 pm**

**Navigating Safely in National Crisis**

- Donna Buccella, Senior Vice President – Business Continuity & Crisis Management, Bank of America

**12:30 pm- 1:50 pm**

**Luncheon Program**

**Pandemic: Are You Prepared?**

- Greg Gist, Citigroup (invited)
- Gerald Lewis, Emergency Management and Organizational Continuity, Boston University
- Mitchell M. Sameroff, Resiliency Risk Management, JPMorgan Chase (invited)
- U.S. Department of Homeland Security (invited)
- Moderator, Charles Wallen, Managing Executive, FSTC

**2:00 pm – 3:30 pm**

**Breakout Sessions:**

**Session 1:**

**New Weapons to Fight Fraud: Getting Ahead of Cyber Crime**

- Fran Rosch, Vice President Authentication Solutions, VeriSign
- Glen Sgambati, CIO, Early Warning
- Marc Gaffan, Director of Marketing for Consumer Solutions, RSA, The Security Division of EMC

- Session 2:** **Building a Resilient Financial Services Enterprise**
- Rich Caralli, Chief Architect for Resiliency Engineering, Carnegie Mellon
  - Richard Reichgut, Financial Services Developer Relations & Strategic Solutions, AMD
  - Char Whitcomb, Director of Business Continuity, Key Bank
  - Moderator: Charles Wallen, Managing Executive, FSTC

**3:30 pm – 3:50 pm** **Afternoon Break**

**4:00 pm – 5:00 pm** **Breakout Sessions:**

- Session 1:** **Interoperable Security & Mobility in Ecommerce**
- Jeff Stapleton, CTO, Innové LLC
  - Sam Phillips, Information Security, Bank of America
  - Matthew Neely, National City Bank
  - Moderator, Dan Schutzer, FSTC Executive Director

- Session 2:** **IBM's Point of View on Mobile Payments**
- June Felix, General Manager, Global Managing Solutions, IBM

**5:00 pm – 6:00 pm** **Networking Reception**

**THURSDAY, MAY 17** **FSTC 2007 ANNUAL CONFERENCE**

**7:00 am – 8:00 am** **Continental Breakfast**

**8:00 am – 8:20 am** **FSTC FI Principal Members Meeting**

- 8:20 am - 9:20 am** **The Profitability Factor: Balancing Innovation & Risk in Payments**
- Denny Carreker, President & CEO, Carreker Corporation
  - Tom Vicknair, Senior Vice President & CTO, JP Morgan Chase
  - Dave Opper, SVP Deposits and Payments Technology, Bank of America

**9:30 am– 10:30 am** **Breakout Sessions:**

- Session 1:** **Web Identity & Trust in Online Financial Services**
- Peter Alterman, Assistant CIO – E Authentication, NIH and Chair, Federal PKI Policy Authority
  - Bob West, Founder and CEO, Echelon One, LLC
  - Phillip Hallam Baker, VeriSign
  - Moderator: Michael McCormick, Wells Fargo

- Session 2:** **Challenges & Compliance: Resilient Financial Services Enterprise**
- Barry Gorelick, Director of Business Continuity, Ameriprise
  - Mark Edmead, Control Solutions International
  - Moderator: Michael Gifford, Director of Resiliency, Capital Group

**10:30 am – 10:50 am** **Coffee Break**

**11:00 am – 12:00 pm** **Breakout Sessions**

**Session 1:**

**Business Impact of Operational Risks: The Changing Technology Landscape**

- **The Economic Meltdown of Moore's Law**  
Kenneth Brill, Executive Director, The Uptime Institute, Inc.  
Bob Cashner, SVP, Wachovia Corporate Real Estate
- **Mitigating Risks at the Network's Edge**  
Dave Ascani, CFO, Persysent

**Session 2:**

**Managing Risk & Fraud: Innovative Banking Processes**

- Joe Bugalski, Visa International

**12:15- 2:00 pm**

**Luncheon Program:**

**Technology Planning: Staying Ahead of the Information Tidalwave**

- Jim Kittridge, Senior Vice President, Wachovia Corporation

**Closing Challenge – FSTC Board members**

- Tom Vicknair, Chairman FSTC, SVP Operations JPMC
- Dave Opper, Vice Chairman FSTC, Bank of America
- Mark Tiggas, Treasurer FSTC, SVP Architecture, Wells Fargo
- Don Parker, Past Chairman FSTC, EVP & CIO, Bank of Oklahoma
- Dan Vermeire, VP & CTO, Huntington Bank
- Peter Allutto, Managing Director Deposit Services, Bank of New York
- Joseph Monk, SVP Gr Exec Retail & Channel Technology, Wachovia
- Deepa Soni, SVP Director Enterprise Architecture Group, Key Bank
- Joseph Reilly, EVP Director of I S & T, Zion's Bancshares
- George Sudru, SVP & CTO, Comerica
- Catherine Allen, CEO, BITS
- John Voss, VP & CTO, Marshall & Isley
- Gary Word, Managing Director, Citi Bank
- Thomas Hirsch, SVP, US Bank

**2:00 pm Adjournment**

**Don't miss this unique opportunity to take charge of the future by becoming a part of FSTC, an organization tackling the tough issues with solutions that are profit minded. Contact Betsy Love at [betsyl@truenorthintl.com](mailto:betsyl@truenorthintl.com) for details of membership advantages at this Conference.**



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