



AFS Summit 2025 Agenda

Tuesday, April 8, 2025		
Time	Session Topic	Speaker
8:30 AM	Welcome	Rick Bare, CEO & President, AFS Dean Snyder, Executive Vice President Business Solutions
8:45 AM	Latest Trends in Commercial Lending	Jared Rorrer, Managing Director, Accenture Daniel Seay, CIO Commercial Bank, Fifth Third Bank
9:30 AM	Comerica Bank's AFSVision Experience – Implementation and Beyond	Jackie Woodward, Executive Vice President, Lending and Trade Services, Comerica Bank Melissa Hofer, COO & Sr. Executive Vice President, AFS
10:15 AM	BREAK	
10:30 AM	Excellence in Product Release Management <ul style="list-style-type: none"> • Overview of upcoming release content • AFS release planning • Considerations for staying current on releases • Importance of “embrace the base” 	Derrick Wise, Managing Director, Business Product & Process Management, AFS John Dubil, CTO & Sr. Vice President, AFS
11:15 AM	Maximizing your Investment in AFSVision <ul style="list-style-type: none"> • The Upgrade experience – what banks can expect • Improving the communication and engagement model – Customer Success Management • Ongoing planning through quarterly business and AFSVision usage reviews 	Ray Turner, Sr. Vice President Client/Business Services, AFS Drew Burkhardt, Managing Director, Customer Success, AFS
Noon	Break Out Session 1: What is in Store for AFSVision Syndications	Jennifer Oddo, Director Business Solutions, AFS Charles Wambua, Senior Project Lead, AFS
	Break Out Session 2: Training – Tools to help navigate AFSVision	Derrick Wise, Managing Director Business Product & Process Management, AFS
12:30 PM	LUNCH—Scavenger Hunt Activity Clients will be given a card with AFSVision features and will be encouraged to “seek and find” other banks that are using that functionality to learn from their experiences.	Brenda Alek, Managing Director, Business Solutions, AFS
1:45 PM	IRIS AFS will demonstrate the new IRIS reporting capabilities available in AFSVision®, Release 3.8 and plans for the future.	Doug Skinner, Managing Director, Business Intelligence, AFS Jennifer Flynn, Manager, AFSVision Reporting, AFS
2:15 PM	Excellence in Implementation <ul style="list-style-type: none"> • AFS will highlight the best practices to make an implementation successful • Review “lessons learned” and thoughts on how to de-risk projects and avoid delays • Top items a bank can do to get ready including data cleanup, testing and training 	Gerry deBruijn, Director, Project Management Office
2:45 PM	How to De-risk Projects and Avoid Delays	Dom Grillas, Managing Director, Bridge 2 Partners Aaron Weissberger, Managing Director, Bridge 2 Partners
3:05 PM	Break	
3:20 PM	Review Scavenger Hunt Results AFS will summarize the results and highlight certain features that are being utilized and those that are not.	Brenda Alek, Managing Director, Business Solutions, AFS Derrick Wise, Managing Director Business Product & Process Management, AFS

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3:50 PM	Testing Best Practices NTT Data will provide insight into how to approach testing during an AFSVision project, with AFS providing additional best practices and enhanced offerings.	Jim Adams, Vice President, Financial Services, NTT Data Dave Horger, Managing Director, Testing/Quality Assurance, AFS
4:20 PM	Break Out Session 1: AFS Plans for Loan Origination AFS will provide an overview of where we are in re-architecting AFSVision for Loan Origination and solicit audience input into what is important	John Dubil, CTO & Sr. Vice President, AFS Jason Flowers, Director, Business Product & Process Management, AFS
	Break Out Session 2: Excellence in Operations – AFS will facilitate a discussion amongst bankers to explore topics such as Staffing, Training, SLA's, performance measurements, process improvements, etc.	Brenda Alek, Managing Director, Business Solutions, AFS Derrick Wise, Managing Director Business Product & Process Management, AFS
4:50 PM	AI Session 1 with Industry Experts	Steve Fricano, Managing Director, Deloitte
5:10 PM	AI Session 2 with Industry Experts	Ashok Menon, Head of Strategic Initiatives, Go Live Faster
5:30 PM	Wrap Up	Dean Snyder, Executive Vice President Business Solutions
5:30 PM	Cocktail Hour at Convene	

Wednesday, April 9, 2025

Time	Session Topic	Speaker
8:30 AM	AFS Cybersecurity and Resilience Strategies AFS is one of the largest loan processing companies. Learn what we do to keep your data safe and the system up and running 24x7.	Rad Laney, CIO & Sr. Vice President, AFS Mike Hoffman, Chief Information Security and Risk Officer
9:00 AM	The AFS and U.S. Bank Relationship U.S. Bank will provide insight into their journey to AFSVision, their decisions and future directions.	Merrick Wee, Vice President, Software Engineering Director, U.S. Bank
9:30 AM	Break Out Session 1: Integration Options and Experiences (iSIP, Kafka, APIs, Robotics, Import Services)	John Dubil, CTO & Sr. Vice President, AFS
	Break Out Session 2: Product Roadmap Detail AFS will provide additional detail on the features that are coming up in the next releases and on the Product Roadmap	Derrick Wise, Managing Director Business Product & Process Management, AFS
10:00 AM	Break	
10:15 AM	Excellence in Customer Service In this session the speakers will discuss how using AFSVision can change the customer self-service model for both internal and external clients by leveraging the UI, workflow tools, APIs and online Banking.	Kristin Brewster, Sr. Vice President, M&T Bank Amy Crum, Sr. Vice President - Commercial Operations, Huntington Bank Brenda Alek, Managing Director, Business Solutions, AFS
10:45 AM	AI Session 3 with Industry Experts	Darryl Grant, Principal, Financial Services, KPMG Anand Shah, Partner, US Banking and Ops Leader, KPMG
11:25 AM	WRAP UP	Dean Snyder, Executive Vice President Business Solutions