



SUNGARD AMBIT AMERICAS SUMMIT 2009 AGENDA

April 19 - 22, 2009
Chicago, IL



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Bank of the Future



Ambit Americas Summit 2009 – Agenda

Note: Agenda is Subject to Change

SUNDAY - APRIL 19, 2009		
9:00 AM - 6:00 PM		
Arrivals/Registration		
6:30 PM - 9:30 PM		
Welcome Networking Reception		
MONDAY - APRIL 20, 2009		
9:00 AM - 10:30 AM		
Lessons for Risk Management from the Current Crisis Guest Speaker: David Rowe Exec. VP for Risk Management, SunGard		
10:30 AM - 11:00 AM		
BREAK		
11:00 AM - 12:00 PM		
Regulatory Update Guest Speaker: Tom Day Managing Director, Risk Management at the Office of Thrift Supervision		
12:00 PM - 1:30 PM		
LUNCH		
1:30 - 2:15		
Risk & Performance Strategic Overview		
<p>Strategy Update: What is new in Ambit BancWare? How has the economic environment changed how banks approach risk & performance management - taking a close look at how asset & liability management relates to profitability & pricing.</p>		
2:30 - 3:20		
Next Generation in Risk Management		
<p>The Bank of the Future will need to adapt its risk & compliance management strategies and processes to not only survive but to grow. A more holistic approach to risk management is needed in the wake of the financial crisis for a more accurate view of market, credit and operational risk. By combining risk analysis with customer profitability evaluation, banks can gain greater insight for improved performance. Attend this session to understand how the next generation in risk management will take this approach.</p>		
Customer Presentation: Susquehanna on ALM & Profitability		
3:15 - 3:45		
BREAK		
3:45 - 4:35		
Best Practices in Profitability Analysis	Best Practices in ALM	Best Practices in Economic Capital
<p>Understanding How to Leverage Profitability Analysis to Help Fuel Growth Strategies Case Study Presentation</p>	<p>Why Traditional ALM Metrics Are No Longer Applicable Case Study - SouthEast Corp</p>	<p>Using Economic Capital to move from traditional Profitability to Risk Adjusted Profitability Case Study - Community America Credit Union</p>
Evening Event - Customer Appreciation Dinner 6:30 PM Cocktails / 7:00 PM Dinner		

TUESDAY APRIL 21 2009			
8:00 AM - 9:00 AM			
BREAKFAST			
9:00 AM - 10:30 AM			
ALM 4 User Group	ALM 5 User Group	Abacus User Group	Treasury Product Strategy & Updates
Product Update Hear an update on recent and future development in ALM4, as well as an update on the next generation in risk management solutions	Tips & Tricks A demonstration of helpful and time saving tips in the ALM 5 program	Product Update Hear an update on recent and future developments in Abacus with open forum Q&A.	This full day of programming will include breakout sessions on our Treasury Solutions - Quantum, Integrity, ResIQ, ICMS, APS2 - by product. Each room will have a dedicated stream with product and service experts on hand to answer questions and take feedback from the client base. Sessions will include a full update on the product line, an overview of associated modules, and client led best practice sessions.
Prepayment Assumptions A Review of Sources and Methodologies Customer Presentation : Old Second	Product & Intel Performance Update Hear an update on recent and future development in ALM5, as well as an update on the next generation in risk management solutions. Also, hear the latest technology updates in the BancWare/INTEL partnership.	Risk Ratings, Macroeconomic Modeling, and Stress Testing. Learn about key drivers of credit risk, broken down into customer based vs. collateral based risks. This session reviews the role of these risks and other macroeconomic factors play in enabling banks to forecast their losses.	
10:30 AM - 11:00 AM			
BREAK			
11:00 AM - 12:40 PM			
ALM	Credit Portfolio Management	New Product Overview: BancWare Budgeting & Planning	Treasury Case Studies & Best Practices
ALM Practices Survey Presentation Attend this open forum to learn how your peers answered questions relating to top concerns, regulatory developments, and ALCO requests.	Implementing an Active Credit Portfolio Management Framework In this session we will discuss different approaches to implementing an active credit portfolio management framework. The main components that we will be covering are: Allowance For Loan and Lease Losses, Limit Setting/Management and Credit Default Swaps.	Introducing BancWare's NEW Budgeting Solution Learn more about BancWare's latest solution that integrates our proven income simulation, funds transfer pricing and profitability solutions into one powerful package to make budgeting easier and more accurate.	As part of the breakout sessions, there will be client presentations offering the ability to share best practices amongst your peers. These sessions will focus on how the various applications are being used to more effectively manage cash, mitigate risk, improve cash flow, enhance forecasting abilities and reduce cost structure. These also include best practice usage presentations by domain experts aimed at helping customers maximize their existing investments in technology.
Liquidity Risk Management in the Current Economic Environment Liquidity risk measurement challenges and best practices for measuring liquidity risk, scenarios, stress tests, regulatory compliance, pricing and contingency planning.	An Objective Approach to Quantifying ALLL / Reserves with Best Practices Case Study Hear a case study on building a custom Allowance for Loan and Lease Loss model that incorporates concepts like loss migrations, macroeconomic factors and metrics that focus on the imprecision of these different estimates. Customer Presentation: MB Financial	Practitioner's Overview of Budgeting & Planning This session will delve into discussing how Budgeting & Planning fits into RAPM. Discussions on how to create better goals and better incentive compensation plans.	
12:30 PM - 1:30 PM			
LUNCH			

TUESDAY - APRIL 21, 2009 (continued)			
1:30 PM - 2:20 PM			
What's New in BDI & FTP?	Economic Capital	Liquidity Risk for Profitability	Treasury Open Forum / Q&A
<p>Product Update Hear an update on recent and future development in FTP and BDI</p>	<p>Customer Case Study Hear a case study on best practices on how our customers are using our economic capital solutions</p>	<p>Liquidity Risk: From ALM Theory to a Practical Application Hear how you can put liquidity risk analysis to work at the point of sale. Learn how to measure the effectiveness of liquidity risk premiums and discounts.</p>	<p>As part of the full day of programming for each product line, there will be an open Q&A session. These sessions will offer customers the ability to ask questions to application experts and peers regarding system functionality, best practice usage and general questions including topics around process and workflow. This slot will help to wrap up the day of product specific sessions in an open forum environment. Bring your questions!</p>
2:20 PM - 3:10 PM			
BDI & FTP	Liquidity Risk	Incentive Compensation	
<p>Customer Case Study Hear our customer speak on best practices for using BDI & FTP. Customer Presentation: FNB Omaha</p>	<p>Liquidity Risk in ALM 5 See the functional set Bancware is working on to address LRM requirements</p>	<p>RAPM Based Incentive Compensation Discuss what went wrong with yesterday's comp. plans, how to transition away from them and the best methods for making management, shareholders and regulators happy.</p>	
3:10 PM - 3:40 PM			
BREAK			
3:40 PM - 4:30 PM			
Risk Modeling Best Practices	ALM Best Practices	Economic Capital	Treasury Breakout
<p>A Holistic and Integrated Approach to Risk and Performance Customer Presentation: Community America Credit Union</p>	<p>ALM Open Forum This will offer customers the ability to ask questions to application experts and peers regarding system functionality, best practice usage and general questions.</p>	<p>Taking the stress out of stress testing In light of recent moves by regulators, we take a look at the sometimes troubled relationship between economic capital and stress testing.</p>	<p>Your choice of two sessions: eTreasury (how to gain visibility to cash positioning from remote locations) or Advanced Risk Management (looking at the QRisk product)</p>
Wednesday April 22 2009			
8:00 AM - 9:00 AM			
Breakfast for Optional Training			
9:00 AM - 3:00 PM			
See Listings of Optional Training on Ambit Summit Website.			