

Financial Services Association Leadership Summit



2024



Agenda

8:30 a.m.

Breakfast

Sponsored by



9 a.m.

Welcome Remarks

Wayne Chopus, President & CEO, IRI

9:10 a.m.

Alexander Hamilton, Crisis Leadership, and the Resurrection of American Finance

In May 1787, the new nation was locked in an economic crisis greater than the Great Depression of the 1930s. Alexander Hamilton was charged with resurrecting the system. Not before or since has crisis leadership—in the financial sector, no less—been more timely or important. This session will educate financial services leaders on the origins of their industry, provide tools for situational analysis used by Hamilton and his compatriots, and offer lessons on leading financial organizations through both macro and acute crisis situations.

Scott Miller, PhD

9:55 a.m.

Facilitated Discussion

Heather Soubra, AAC

10:20 a.m.

Break

10:30 a.m.

CEO Panel: Engagement Best Practices

Successful trade associations must foster stakeholder relationships to drive outcomes. This includes robust partnerships with board members to set the direction of the organization, driving employee loyalty to attract and retain top talent, and enhancing and communicating value to the membership base. In this session, four trade association CEOs will discuss the strategies their organizations are using to drive deep, impactful engagement.

PANELISTS

Ken Bentsen, President & CEO, SIFMA

Marc Cadin, CEO, Finseca

Kevin Mayeux, CEO, NAIFA

MODERATOR

Wayne Chopus, President & CEO, IRI

11:15 a.m.

Break and Transition



11:30 a.m.

Rare Book Tour

Dr. Peter Cressy, RADM USN Ret.
Joseph Stoltz, PhD

12:15 p.m.

Lunch at the Mount Vernon Inn Restaurant

1:30 p.m.

Break and Transition

1:45 p.m.

Leading with Character

George Washington’s approach to leadership made him one of the most revered figures of the founding era. Today more than ever, character, credibility, and trust are essential foundations of effective leadership. This presentation and discussion combine the impactful lessons of history with the evolution of the criteria for a modern-day leader.

Dr. Peter Cressy, RADM USN Ret.
Heather Soubra, AAC

3 p.m.

Break

3:15 p.m.

CEO Panel: Association Hot Topics

As unique as our trade associations are, we face many common challenges and opportunities: navigating advocacy in today’s political climate, the need for robust DEI strategies, fostering trade collaboration, and negotiating an evolving industry landscape due to M&A. In this session, four trade association CEOs will discuss these issues and other hot topics impacting our collective organizations.

PANELISTS

Dale Brown, President & CEO, FSI
Chuck DiVencenzo, President & CEO, NAFA
Eric Pan, President & CEO, ICI

MODERATOR

Susan Neely, President & CEO, ACLI

4 p.m.

Closing Remarks

Wayne Chopus

4:15 p.m.

Reception

Sponsored by



5:30 p.m.

Departure



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