



NORTHERN NEW ENGLAND
SCHOOL OF BANKING

MONDAY, OCTOBER 19-
FRIDAY, OCTOBER 23, 2026

THE VENUE AT PORTWALK PLACE,
PORTSMOUTH, NH

AGENDA

MONDAY, OCTOBER 19

State Association Host

Chris D'Elia, *Vermont Bankers Association*

11:45 am – 12:30 pm

BUFFET LUNCHEON

12:30 pm – 1:00 pm

OPENING SESSION

Christopher D'Elia, *Registrar*

Introduction

Philosophy of the School

Plans for the Session

1:00 pm – 1:30 pm

INTRODUCTION TO BANKING & OTHER ISSUES

Christopher D'Elia, *Registrar*

History of Banking and Legislation

Forces Impacting the Industry

1:30 pm – 2:30 pm

ROLE OF YOUR STATE BANKERS ASSOCIATION

Christopher D'Elia, *President, Vermont Bankers Association*

Kristy Merrill, *President & CEO, New Hampshire Bankers Association*

TBD, *President, Maine Bankers Association*

2:30 pm – 2:45 pm

REFRESHMENT BREAK

2:45 pm – 5:00 pm

BIRTH ORDER: WHAT'S IT GOT TO DO WITH BUSINESS ANYWAY?

HOW TO WORK WITH DIFFICULT PEOPLE IN THE MARKETPLACE

Jack Agati, *Encouraging Concepts Associates*

6:00 pm

BEER, WINE & CHEESE RECEPTION

6:30 pm

DINNER



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TUESDAY, OCTOBER 20

State Association Host

Chris D'Elia, *Vermont Bankers Association*

7:30 am – 8:15 am

BREAKFAST BUFFET

8:15 am – 9:45 am

ECONOMIC DEMOGRAPHICS

Andrew Paolillo, *VP, Director of Member Strategies & Solutions, FHLBB*

9:45 am – 10:00 am

BREAK

10:00 am – 12:00 pm

FUNDAMENTALS OF LENDING (Includes Time for Case Study Analysis)

TBD, *Mortgage Lender*

John Bortolotto, *SVP Southern NH Market Leader, Mascoma Bank*

12:00 pm – 1:00 pm

LUNCH

1:00 pm – 2:30 pm

FRAUD, CYBERCRIME, SECURITY

John H. Rogers, *CISSP, Monarch Information Security Consultants*

2:30 pm – 2:45 pm

REFRESHMENT BREAK

2:45 pm – 4:15 pm

BUSINESS DEVELOPMENT: ACQUIRING, RETAINING AND ATTRACTING CUSTOMERS

Chantal Upton, *Vice President, Learning & Development Manager, Saco Biddeford Savings Institution*

4:15 pm – 4:30 pm

BREAK

4:30 pm – 5:45 pm

THE FUTURE OF TECHNOLOGY IN FINANCIAL SERVICES

Matt Putvinski, *CPA, CISA, CISSP, Wolf & Company, P.C.*

6:30 pm

DINNER

7:30 pm

TEAM BUILDING/NETWORKING EXPERIENCE

Get ready to test your knowledge with a round of trivia! Teams will be pre-assigned.



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WEDNESDAY, OCTOBER 21

State Association Host

Chris D'Elia, *Vermont Bankers Association*

7:30 am – 8:15 am

BREAKFAST BUFFET

8:15 am – 10:15 am

BANK FINANCIAL STATEMENTS/ROLE OF THE CFO

Nate Cadorette, *SVP, Chief Financial Officer,*
Kennebunk Savings Bank

10:15 am – 10:30 am

BREAK

10:30 am – 11:45 am

ASSET LIABILITY MANAGEMENT

Nate Cadorette, *SVP, Chief Financial Officer,*
Kennebunk Savings Bank

11:45 am – 12:30 pm

LUNCH

12:30 pm – 2:00 pm

MARKETING FOR THE FUTURE

Linda Varrell, *APR, Broadreach Public Relations*

2:00 pm – 2:15 pm

BREAK

2:15 pm – 3:15 pm

INTRODUCTION TO TRUST SERVICES AND WEALTH MANAGEMENT

Jennifer Cook, *Senior Vice President, Senior Trust Officer, Norway*
Savings Asset Management Group

3:15 pm – 3:30 pm

REFRESHMENT BREAK

3:30 pm – 5:30 pm

CEO PANEL DISCUSSION

TBD, *Maine CEO*

TBD, *New Hampshire CEO*

Heidi Stumpff, *Regional President for Vermont, M&T Bank*

DINNER ON YOUR OWN



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THURSDAY, OCTOBER 22

State Association Host

Chris D'Elia, *Vermont Bankers Association*

7:30 am – 8:15 am

BREAKFAST BUFFET

8:15 am – 9:15 am

FROM SUPERVISOR TO LEADER

David Ciullo, *CEO, Career Management Associates*

9:15 am – 9:30 am

BREAK

9:30 am – 10:45 am

FROM SUPERVISOR TO LEADER *(continued)*

David Ciullo, *CEO, Career Management Associates*

10:45 am – 11:00 am

BREAK

11:00 am – 12:30 pm

FROM SUPERVISOR TO LEADER *(continued)*

David Ciullo, *CEO, Career Management Associates*

12:30 pm – 1:30 pm

LUNCH

1:30 pm – 3:15 pm

ERM, CRA, & COMPLIANCE

Melodee Stearns, *VP, Compliance Officer, Partners Bank*

3:15 pm – 3:30 pm

REFRESHMENT BREAK

3:30 pm – 5:00 pm

HUMAN RESOURCES ISSUES IMPACTING MANAGERS

Brian Bouchard, *Attorney, Sheehan Phinney*

6:00 pm

DINNER



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FRIDAY, OCTOBER 23

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Chris D'Elia, *Vermont Bankers Association*

7:30 am – 8:15 am

BREAKFAST BUFFET

8:15 am – 10:15 am

PUBLIC SPEAKING

Dr. Cristy Beemer, *Director of Composition, Professional & Technical Writing Coordinator, Associate Professor, University of New Hampshire*

10:15 am – 10:30 am

BREAK

10:30 am – 11:45 am

WRITTEN COMMUNICATION SKILLS

Dr. Cristy Beemer, *Director of Composition, Professional & Technical Writing Coordinator, Associate Professor, University of New Hampshire*

11:45 am

ASSIGNMENTS AND WRAP UP

11:45 am

BOX LUNCHES (*take it for the road or relax and eat while you wait for the line at the valet to get shorter.*)
