



Advanced Asset Liability Management Concepts

Wednesday, October 22, 2025

8:00 am - 8:45 am	Registration and Continental Breakfast
8:45 am - 9:00 am	Welcome
9:00 am - 10:00 am	<i>Investment Management</i> Katie Hopkins, Director, Advisory Services, ALM First
10:00 am - 11:00 am	<i>Asset Pricing and Marginal Return Analysis</i> Savanah Hall, Director, Advisory Services, ALM First
11:00 am - 12:00 pm	<i>Risk and Diversification in Spread Portfolios</i> Tavish Taylor, Director, Advisory Services, ALM First
12:00 pm - 1:00 pm	Lunch
1:00 pm - 2:00 pm	<i>Assumptions and Sensitivity Testing I</i> Savanah Hall, Director, Advisory Services, ALM First
2:00 pm - 3:00 pm	<i>Liquidity Management</i> John Nilles, Independent Consultant, J Nilles Advisory, LLC
3:00 pm - 4:30 pm	<i>Economic Update: Trends and Challenges for Credit Unions</i> Tavish Taylor, Director, Advisory Services, ALM First
4:30 pm - 6:30 pm	Reception

Thursday, October 23, 2025

8:30 am - 9:00 am	Continental Breakfast
9:00 am - 10:00 am	<i>Assumptions and Sensitivity Testing II</i> Katie Hopkins, Director, Advisory Services, ALM First
10:00 am - 11:00 am	<i>Hedging Strategies for Credit Unions</i> Tyler Long, Associate, ALM Strategy Group, ALM First
11:00 am - 12:00 pm	<i>Loan Participations</i> John Kornacki, Director of Finance and Treasury, Digital FCU; Joseph Princi, SVP and CFO, Jeanne D'Arc CU; and Robert Spinello, AVP, Financial Risk and Compliance, EasCorp
12:00 pm - 1:00 pm	<i>Regulators' Perspectives</i> Thomas Dumont, Regional Field Manager, and Seth Hersey, Supervisory Examiner, Risk Management Unit, Commonwealth of Massachusetts Division of Banks
	A bagged lunch is provided. You may stay to enjoy with your peers or take it to go with you following the closing remarks.