



2025 Executive Summit

August 5-7, 2025

Woodstock Inn & Resort | Woodstock, VT

Agenda

Tuesday, August 5, 2025

8:30 am – 7:00 pm	Registration Open <i>Sponsored by Hudson Cook, LLP</i>
9:00 am – 3:00 pm	Golf at Woodstock Country Club <i>Sponsored by Crown Asset Management, LLC & TRAKAmerica</i> 9:00 am Shotgun Start
9:00 am – 10:00 am	Networking Breakfast
10:00 am – 10:50 am	Valuation and M&A: Maximizing Your Valuation <i>Speakers:</i> Michael Lamm, Corporate Advisory Solutions Matthew Maloney, FFAM360 Alliance Amber Russo, Kino Financial Co. LLC
10:50 am – 11:00 am	Networking Break
11:00 am – 11:50 am	Prepare for the Foreseeable: Before, During, and After a Breach <i>Speaker:</i> Ryan Gerstung, Velocity Portfolio Group, Inc. Fred Langston, Critical Insight Amy Nodine, InvestiNet
12:00 pm – 12:50 pm	Ethics as the Cornerstone of a Compliance Management System <i>Speaker:</i> Don Maurice, MauriceWutscher, LLP
12:50 pm – 2:00 pm	Networking Lunch <i>Sponsored by Absolution Resolutions Corp.</i>
2:00 pm – 2:50 pm	Consent Management Is Taking Over and There's No Sign of It Stopping <i>Sponsored by Prodigal</i> <i>Speakers:</i> Chuck Dodge, Hudson Cook, LLP Anne Thomas, Cavalry Investments, LLC

2:50 pm – 3:10 pm	Iced Coffee Break <i>Sponsored by Equifax, Inc.</i>
3:10 pm – 4:00 pm	Market Trends and Their Impact on 2025 <i>Sponsored by Security Credit Services, LLC</i> Speakers: Dan Simmons, TransUnion Laura Jensen, Absolute Resolutions Corp.
5:00 pm – 7:00 pm	Opening Reception <i>Sponsored by Venable LLP</i>
9:00 pm – 11:00 pm	Tuesday After-Hours Firepit <i>Sponsored by WebRecon LLC</i>
Wednesday, August 6, 2025	
7:30 am – 3:30 pm	Registration Open <i>Sponsored by Hudson Cook, LLP</i>
8:00 am – 9:45 am	Breakfast with Industry Partners <i>Sponsored by Velocity Portfolio Group, Inc.</i>
9:45 am – 10:00 am	Networking Break
10:00 am – 10:50 am	Welcome & Keynote Address by State Treasurer Mike Pieciak, Vermont
10:50 am – 11:10 am	Networking Break <i>Sponsored by Orbita Capital Group</i>
11:10 am – 12:00 pm	State of the Financial Services Associations Speakers: Andrew Duke, Online Lenders Alliance (OLA) Brian Fritzsche, Consumer Bankers Association (CBA) Sarah Merchak, Consumer Data Industry Association
12:00 pm – 1:10 pm	Networking Lunch
1:10 pm – 2:00 pm	Fireside Chat on State Attorney General Actions and Industry Readiness Speakers: Jim Mastriani, Velocity Portfolio Group Vaishali Rao, Hinshaw & Culbertson, LLP Meghan Stoppel, Foley & Lardner LLP
2:10 pm – 3:00 pm	RMAI Working Groups – Working for You <i>Sponsored by LexisNexis Risk Solutions</i> Speakers: Bekah Luebcke, Crown Asset Management, LLC Mellisa Massey, National Credit Adjusters, LLC Don Maurice, MauriceWutscher, LLP Brett Soldevila, Security Credit Services, LLC Jackson Walker, Resurgent Capital Services

3:30 pm – 5:00 pm	Pickleball Tournament <i>Sponsored by DebtLink</i>
6:00 pm – 9:00 pm	Wednesday Evening Networking Social <i>Sponsored by EZ Messenger</i>
9:00 pm – 11:00 pm	Wednesday After-Hours Firepit <i>Sponsored by TransUnion</i>
Thursday, August 7, 2025	
8:00 am – 10:00 am	Registration Open <i>Sponsored by Hudson Cook, LLP</i>
8:00 am – 8:45 am	Continental Breakfast
8:45 am – 9:35 am	Regulation, Privacy, and Artificial Intelligence: Navigating the Future of Compliance <i>Speakers:</i> Justin Miller, Kompato AI Inc. Kim Phan, Troutman Pepper Locke Sara Woggerman, ARM Compliance Business Solutions
9:35 am – 9:45 am	Networking Break
9:45 am – 10:35 am	Fireside Chat with Former CFPB Regulator <i>Speaker:</i> John McNamara, Former CFPB
10:45 am – 11:45 am	State & Federal Legislative & Regulatory Update <i>Speakers:</i> Ryan Carney, K&L Gates, LLP Don Maurice, MauriceWutscher, LLP David Reid, RMAI Meghan Stoppel, Foley & Lardner LLP
11:45 am – 12:00 pm	Retreat Wrap-Up Led by President Jon Mazzoli

Updated 6/30/2025

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