The BrandFinance® Banking Forum 2014
Managing your banking brand in a post-recession era: Are banks adapting to change?

Agenda

18th February 2014
Harvard Club New York City
Presidents room
35 West 44th Street
New York City NY 10036
As we emerge from the global banking crisis and the storm clouds appear to be finally clearing, we take a closer look at what banks are doing to adapt and grow in a more complex and ever changing world.

With a banking landscape vastly different to the one we knew before, we ask ourselves, what are the strategies for building long-term shareholder and brand value? Pose your questions to a mixed panel of banks and brand specialists and hear their thoughts and vision for the future of the banking sector.

Join us at the 3rd Annual New York Banking Forum at the Harvard Club, where we will be discussing the strategies for managing your banking brand in a post-recession era.

Who should attend?
CEOs, CMOs, CFOs and senior managers of corporate brands who are interested in understanding the value of their brands.
# Program

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<th>Timing</th>
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| **07:30 - 08:00** | Registration and Breakfast                        | Edgar Baum  
Managing Director, North America  
Brand Finance                                      |
| 08:00 - 08:10   | Welcome and Introduction                           | Edgar Baum  
Managing Director, North America  
Brand Finance                                      |
Global Director Finance Services  
Landor Associates                                    |
| 08:40 - 09:10   | Behind the Brand: Deconstructing the Impact of Digital Signage on the Retail Banking Customer | Angela Vanderburg  
Retail Banking Practice Lead  
Stratacache                                             |
| 09:10 - 09:40   | Brand from the Inside Out                           | Dr. David Kippen  
CEO & Chief Strategist  
Evviva Brands                                          |
| 09:40 - 10:10   | The Importance of Managing Brand to Drive Value     | Anne Rivers  
SVP, Global Director of Brand Strategy  
BAV Consulting                                          |
| 10:10 - 10:40   | Brand Valuation: The True Indicator of Future Business Performance | Edgar Baum  
Managing Director North America  
Brand Finance                                          |
| 10:40 - 11:30   | Panel Session:  
Looking in the Rear view mirror…  
Optimizing your brand in an era of consolidation.  
Moderator:  
Bill Zabit  
BrandTransact Worldwide                                 | Michael Lacorazza  
Head of Integrated Marketing  
Wells Fargo                                             |
|                 |                                                    | Mary Cianni Ph. D.  
Global Leader, M&A Services  
Towers Watson                                             |
|                 |                                                    | Mich Bergesen  
Global Director Finance Services  
Landor Associates                                          |
|                 |                                                    | Anne Rivers  
SVP, Global Director of Brand Strategy  
BAV Consulting                                                |
|                 |                                                    | Edgar Baum  
Managing Director, North America  
Brand Finance                                                |
| **11:30 - 12:30** | Lunch & Networking                                 |                                                                        |
Speaker & Panelist Profiles

Mich Bergesen, Global Director Financial Services, Landor Associates

Mich joined Landor in 2005 and leads the firm’s financial sector branding practice, working across our office network to bring a category specialist perspective. He manages global client programs covering the spectrum of brand strategy development and implementation, with deep experience in both consumer and institutional financial services. Previously, he spent 11 years at Stern Stewart, originators of the Economic Value Added approach to financial management. He founded Stern Stewart’s business in South Africa, then served as managing director of Stern Stewart Europe. He later launched BrandEconomics® in New York, advising clients on building and managing brand value. He developed the valuations used in Landor’s Breakaway Brands® list published in Fortune and Forbes.

Mich holds an MBA in strategy and finance, and a BS and MS in engineering.

Angela Vanderburg, Retail Banking Practice Lead, Stratacache

Angela works with Stratacache’s sales and marketing teams to enhance digital experiences for consumer engagement within the banking sector. Her expertise guides clients so they can build a cohesive digital strategy, with directed messaging to customers that lifts brand awareness and message recall.

Prior to Stratacache, Angela engaged in sales and marketing with companies in a myriad of functions. In 2009, she began focusing on digital signage within retail banking. She's worked with digital technologies on the client and agency side, giving her all-encompassing understanding, insight, and experience that translate into a successful program for her clients. She has built up companies into franchises, run an immensely successful IPO and transitioned a company from a near obsolete technology offering into a new viable business venture.

Angela graduated York University with an Honours Degree in History and Political Science.

Angela lives in Toronto, ON, Canada with her family.

Dr. David Kippen, CEO & Chief Strategist, Evviva Brands

With a background spanning advertising and communications and a client base spanning the globe and including top brands in every sector, Dr. David Kippen is a world-renowned leader in brand strategy, development and positioning. David’s clients include Ameriprise Financial, Bain & Company, BlackRock, Burger King, Catholic Healthcare West, Dignity Health, Chevron, Coca-Cola, Dell, Disney, E.ON, HP, HSBC, General Mills, Intel, Kaiser Permanente, Lam Research, Marriott International, Methanex, Microsoft, Nokia, Premera Blue Cross, Teva, The Ritz-Carlton, T-Mobile and Xilinx.
Edgar Baum, Managing Director North America, Brand Finance

Edgar Baum has an extensive background over 15 years in entrepreneurial and consulting environments with extensive experience in developing adaptable financial forecasting programs.

Previously Edgar ran his own data analytics and financial consulting practice and has previously been a Partner and Vice President for a Toronto based financing consultancy firm. Edgar has worked with companies ranging from start-ups to multinationals across a range of industries including manufacturing, logistics, education, food, and security. Edgar was also the founding partner for a software company that developed a risk and valuation model for domestic and global businesses.

Prior to these roles Edgar has worked at Procter & Gamble, Merrill Lynch and Nesbitt Burns.

Edgar is a graduate of the University of Toronto. He has been a guest at Seneca’s Graduate School delivering a lecture on confidentiality protocols in M&A transactions. Edgar is the Managing Director of Brand Finance North America.

Angela Rivers, SVP, Global Director of Brand Strategy, BAV

Anne is SVP, Director of Global Brand Strategy at BAV Consulting, where she focuses on Non-Profit, Retail, Financial Services, Sports, Healthcare, and Home Improvement brands. Anne’s prior experience over the last 15 years includes leading the strategy, business development and corporate finance efforts at Broder Bros., Co., drugstore.com, Inc. and GiftCertificates.com. Anne was also a Vice President in Investment Banking at Bear, Stearns & Co. Inc. in the Global Industries Group focusing on retail and consumer companies. She has also held several marketing and finance positions at Fidelity Investments. Anne has an M.B.A. from the NYU Stern School of Business and an A.B. in Economics from The University of Chicago.

Michael Lacorazza, Head of Integrated Marketing, Wells Fargo

Michael Lacorazza is Senior Vice President, Integrated Marketing at Wells Fargo. In this enterprise role, Michael leads the development of scaled, integrated marketing efforts, as well as the Wells Fargo brand positioning and expression, advertising and media.

Prior to joining Wells Fargo, Michael was the Managing Director, Retail Marketing at TD Ameritrade. His responsibilities included creation of an enterprise-wide marketing plan and segmentation strategy, leading CRM initiatives, and all digital marketing efforts for the firm. Before TD Ameritrade, Michael was Vice President, Group Director at Digitas - where he led relationships across a variety of clients, including automotive, hospitality and media. Michael also held senior marketing positions at Marriott International and the Lexus Division of Toyota.
Dr. Mary Cianni, Global Leader of M&A, Towers Watson

Mary Cianni, Ph.D. is the Global Leader of Towers Watson’s M&A Practice which provides M&A services across all deal phases and types of transactions. Mary focuses her individual consulting on leading complex M&A assignments and providing strategic oversight to change, culture and leadership activities resulting from corporate transactions and business transformations.

Prior to her current role, Mary was the Global Vice-President of Human Resources at a specialty pharmaceutical company. In this role, she set the strategic direction for the global HR team and led the people integration of three acquired companies. She was also an Associate Professor of Management at Susquehanna University.

Mary has published articles on a range of HR topics in professional and academic journals. She is often featured in a variety of media outlets on topics related to people and cultural integration. Mary holds a Ph.D. in Psychology from Penn State University.

Bill Zabit, President & CEO, BrandTransact Worldwide

Bill Zabit has an in-depth background in transactions as both a consultant and an executive. He has provided internal and external branding and communications services for both global and emerging companies undergoing mergers and acquisitions, IPOs, divestitures, reorganizations, upsizing and downsizing and other business transformation events.

Over the last 30 years, Bill has been the president and CEO of both private and publicly traded companies; has held a variety of senior executive positions in communications, branding and marketing; became a partner in one of the big-four accountancies; and was a principal and national practice leader of one of the largest global consulting firms.

Bill was invited three times to the White House as a communication strategist and advisor for the Clinton Administration and has worked as an advisor and strategist for several of the most prominent companies in the world.

During his career, Bill has earned over 100 awards of excellence, including two Emmy nominations as a director and writer. He has been quoted on a variety of topics by the Associated Press, The Wall Street Journal, Forbes, Fortune, CNN, ABC, CBS, and NBC television news and national radio.
Stratacache

Stratacache provides digital signage solutions designed to promote business growth, drive innovation, and increase productivity. The Company’s products are tiered to provide flexible, manageable, and affordable solutions to enterprise networks and service provider networks of any size. Working with over 300 of the world’s largest firms in the retail, finance, service, hospitality, manufacturing, media and government sectors, Stratacache’s solutions immediately provide a significant return-on-investment to the customer. Stratacache research and development is carried out by a core group of network engineering and software development specialists in the company’s Dayton, Ohio headquarters along with its development centers in Montreal, San Jose, Salt Lake City and Boston. The company was established in 1999, and has facilities across North America, EMEA and APAC. For additional information, please visit www.stratacache.com

Landor Associates

Landor Associates is one of the world’s leading strategic brand consulting and design firms. Founded by Walter Landor in 1941, Landor pioneered many of the research, design, and consulting methods that are now standard in the branding industry. Partnering with clients, Landor drives business transformation and performance by creating brands that are more innovative, progressive, and dynamic than their competitors.

Landor’s holistic approach to branding is a balance of rigorous, business-driven thinking and exceptional creativity. Its work spans the full breadth of branding services, including brand research and valuation, brand positioning and architecture, naming and writing, corporate identity and consumer packaging design, branded experience, brand equity management, brand engagement, and digital branding.
About Brand Finance

Brand Finance is the world’s leading brand valuation consultancy. We advise strongly branded organisations on how to maximise their value through the effective management of their brands and intangible assets. Headquartered in London, Brand Finance is represented in over 15 countries worldwide.

The BrandFinance® Banking 500, now in its sixth year, directly compares the values of the world’s leading banking brands. It is the only direct comparison of brand value within the banking industry.

The study provides an opinion on the point-in-time value of the world’s leading banking brands. Each brand has been accorded a brand rating: a benchmarking study of the strength, risk and future potential of a brand relative to its competitor set, as well as a brand value: a summary measure of the financial strength of the brand.

Brand Finance uses the royalty relief methodology, which is a discounted cash flow (DCF) technique to discount estimated future royalties, at an appropriate discount rate, to arrive at a net present value (NPV) of the trademark and associated intellectual property: the brand value. The royalty relief approach is used for three reasons: it is favoured by tax authorities and the courts because it calculates brand values by reference to documented third-party transactions; it can be done based on publicly available financial information and it is compliant to the requirement under the International Valuation Standards Committee (IVSC) to determine Fair Market Value of brands.

Brand Finance is delighted to have teamed up with The Banker, the monthly international financial affairs magazine, for the sixth year running to publish the results.
Contact information

Brand Finance
Edgar Baum
Managing Director, North America
Tel: +1 647 922 6238
Fax: 416-361-0548
Email: e.baum@brandfinance.com
Web: www.brandfinance.com

About Brand Finance Forums
Brand Finance is committed to the development of theoretical and practical issues surrounding brands. As part of this process, we organise a series of events and forums around the world where leading practitioners in the area of brand strategy, brand building and brand valuation come together to share their experiences and to better understand the process by which valuable brands are created.

The Brand Finance Forum has progressively become one of the definitive events in the area of brand valuation and should not be missed by anyone who is serious about maximising the value of their brands and intangible assets.

To find out more visit www.brandfinanceforum.com

The ultimate collection of information for the world’s largest brands.

- Brand League Tables
- Brand Valuation Reports
- Brand Profiles
- Brand Comparison Tool

Brandirectory is an online encyclopedia of brands where financial results, visual identities, trademark histories and the latest marketing news will be compiled and shared. It is an invaluable resource for brand managers, offering detailed brand profiles and comparative analysis across all major commercial sectors.

To find out more visit www.brandirectory.com