GENERAL BULLETIN

2019 – 079

November 6, 2019

CONNECTICUT
BANKERS
ASSOCIATION
10 Waterside Drive
Farmington, CT 06032-3083
(860) 677-5060
FAX: (860) 677-5066

SENT TO:

CEO, CEO+, Finance,
Associate Members

TO THE CHIEF EXECUTIVE OFFICER
OR INDIVIDUAL ADDRESSED

RE: Financial Managers Society – Boston Chapter, **Navigating the LIBOR Transition**
December 10, 2019 - Hartford/Windsor Marriott Hotel

The Financial Managers Society and Connecticut Bankers Association are pleased to announce the upcoming meeting **Navigating the LIBOR Transition** featuring speaker from Stifel. With all of the excitement and uncertainty in the markets recently, Ryan Henley from Stifel will be discussing the upcoming changes regarding the discontinuation of LIBOR and how to make sure your institution is addressing the changes. Joining Ryan will be Marty Caine, CPA, and Charlie Frago, CPA, from Wolf and Company, P.C. to add their extensive insight on impacts of the LIBOR transition on the Audit and Tax world including recent information from FASB and the IRS.

Ryan Henley, Managing Director, Head of Financial Institutions Strategy Group

Ryan Henley provides analysis and balance sheet strategies to financial institutions and portfolio managers nationwide. He also offers insight on a broad range of issues related to economics, interest rates, investments, and interest rate risk management strategies. He joined Stifel in 2015, as part of the firm's acquisition of Sterne Agee, where he had worked since 2006. Ryan leads the strategic effort within fixed income, where he is Head of the Financial Institutions Strategy team. His expertise lies within the interpretation of the shifting regulatory/accounting environment and asset liability/balance sheet management necessary to navigate these issues. Ryan is a CFA charter holder and an honors graduate of the University of Alabama.

Marty Caine and Charlie Frago, Wolf and Company, P.C.

Marty serves as a principal and the Audit Department Head of Wolf and Company, P.C., and has thirty years of experience as a Certified Public Accountant providing audit and advisory services to business owners, executives and boards of directors. He is responsible for managing a team of professionals to ensure every audit is tailored to the individual needs of his clients. Marty's clients include mutual, privately-held and publicly-traded financial institutions. Charlie is a tax principal in Wolf's Financial Institutions group and is responsible for the successful delivery of tax compliance and planning services to our financial institution clients throughout the Northeast. He also addresses bankers and other professionals on various tax-related topics including tax law changes and tax planning.

We look forward to seeing you there!

REGISTER ONLINE >

Schedule:
5:30 p.m. - Cocktails & Social
6:15 p.m. - Dinner
7:00 p.m. - Main Program (Qualifies for 1 hour of CPE)
8:00 p.m. – End

Date/Location:
December 10, 2019
Hartford/Windsor Airport Marriott Hotel
28 Day Hill Road, I-91 at Exit 38
Windsor, CT 06095

FMS Financial Managers Society
Boston Chapter