



Tuesday, July 22, 2025

4:00 — 5:00 Pre-registration

CPE minutes

Wednesday, July 23, 2025

8:00	—	9:00	Registration & Light Breakfast*	
9:00	—	9:10	Welcome - Sam Sanchez, NCLGIA President	
9:10		10:10	Economic Update - Michael Morin, NC Capital Management Trust	60
10:10	—	10:30	Break	
10:30	—	11:30	Fraud from the Perspective of the Investigator - Brian Myers & Eric Adams, U.S. Secret Service	60
11:30	—	12:00	Business Meeting - NCLGIA Members	
1:15	—	2:15	Investing through Economic Uncertainty Panel Discussion - Dan Klus, NC Class, John Frye, NCCMT, Brian Lee, Multibank Securities, Mike Abbott, three+one, Karen Magness, PFM Asset Management, & Brandon Huebner, First National Bank	
2:15	—	2:30	Break & Light Refreshments*	90
2:30	—	3:30	AI in Banking - Jeff Pauly, Bank of America	
3:30	—	5:00	S.H.I.N.E - The Five Catalysts to be Vibrant - Nicole Greer, Build a Vibrant Culture	60
5:00	—	5:30	Break	
5:30	—	7:00	Rooftop Reception hosted by NC Capital Management Trust	

Thursday, July 24, 2025

8:00	—	9:00	Light Breakfast*	
9:00	—	10:00	Debt Modeling -Mitch Brigulio, Davenport & Co. LLC	60
10:00	—	10:30	Break/Check-out & Light Refreshments*	
10:30	—	11:30	Fiscal Resilience - Melissa Moore, Buncombe County	60
11:30	—	12:30	Cash Management Common Issues and Solutions – David Edwards, DebtBook	60
12:30	—	1:00	Drawings for Door Prizes (must be present to win)	

Total CPE minutes 510

**Breakfasts and break refreshments are sponsored by Davenport & Co., J.P. Morgan, NC Investment Pool, Wells Fargo & Chandler Asset Management.*