



2019

## Identifi Client Conference & Training Seminar

Clearwater Beach, Florida

October 23<sup>rd</sup> - 25<sup>th</sup> • Sheraton Sand Key Resort

[Register here today!](#)

### Wednesday, Oct 23<sup>rd</sup>

- 6:45 - 11:00 **Fishing Charter - Clearwater Beach Marina**  
Jim Bryant, AVP of Implementation will host this offshore adventure where you'll fish for Spanish mackerel, King Mackerel and Barracuda. Space is limited.
- 11:00 - 2:00 **Winter the Dolphin Tour - Clearwater Aquarium**  
Please join our Sr. Implementation Coordinator, Rachel Tomlin and go on the *Behind the Scenes Tour* where you will be inspired and educated on the ongoing work of rescue, rehabilitation and release of dolphins, sea turtles, otters, sharks & pelicans. Then go aboard for the *Dolphin Adventure Tour* for a scenic cruise around their local estuary.
- 1:00 - 4:00 **Training Trivia Treasure Quest - Beach/Gulf Room**  
Join Identifi Training Duo, Forrest Adams & Sheila Nolder for a fun and engaging game of Identifi Trivia. Test your knowledge of all things Identifi - Uplink, Workflow, Analytics and more! Buy a vowel, take "Scan Plans for 500" or just "come on down" for the fun. You and your team may find the Treasure and capture a prize.
- 6:00 - 8:00 **Welcome Reception - Poolside/Sheraton Sand Key Resort**  
Welcome from Al Wiessner; President/Owner of Identifi. Join the Identifi staff, Partners and other Identifi customers for dinner and drinks poolside at the Sheraton Sand Key Resort. Network with your peers and enjoy the live Caribbean music.

### Thursday, Oct 24<sup>th</sup>

- 8:00 - 4:00 **Registration - Outside of Beach/Gulf Rooms**
- 8:00 - 9:00 **Breakfast - Island Room II**  
Get ready to learn! Join the Vendors and Identifi employees and your peers for breakfast.
- 9:00 - 9:15 **Welcome Address - Beach/Gulf Rooms**  
SVP of Sales, Abby Ross will open the day's events with an opening to the conference and a quick overview of the agenda.
- 9:15 - 10:15 **Keynote Speaker - Beach/Gulf Rooms**  
Michael (Mike) Nicastro is the Chief Executive Officer and a Director of New Haven, CT based Continuity, a FinTech company providing compliance management solutions in the growing RegTech sector. Mike is also the owner and Principal of Coppermine Advisors, LLC a business advisory firm offering services such as strategic plan development, capital acquisition and succession planning. Mike is Entrepreneur in Residence and a member of the faculty at the CCSU, School of Business. He has been a guest lecturer at Yale University, School of Management and a Moot Court Judge at Western New England University, School of Law. He also serves on the CT Next Higher Education Advisory Committee.

- 10:15 - 10:30 Break  
 10:30 - 12:00 **Identifi's Latest Unified Product Release - Beach/Gulf Rooms**  
 Take a tour of the latest version of Identifi's Unified Product. We will provide product review, explore new features, and discuss our strategic direction.
- 12:00 - 1:30 **Lunch & Business Break**  
 1:30 - 2:45 **Customer Spotlight Panel - Beach/Gulf Rooms**  
 The session is focused on our hosted customer from onboarding to daily use with a moderated and diverse panel of customers discussing such topics as workflow automation. Learn how and why other institutions have made the move to Identifi's cloud including the challenges and wins encountered along the way
- 2:45 - 3:15 **Identifi Cloud 2019 - Beach/Gulf Rooms**  
 A quick but comprehensive review of the Identifi infrastructure. See what's behind the curtain and learn how we keep your data safe and available while continuing to move the product itself forward.
- 3:15 - 3:30 **Break**  
 3:30 - 4:45 **Identifi User Group Breakout Session - Island Room II**  
 Open to all, this is an onsite meeting of the existing Identifi User Group. To join now, email [mbasque@NeedhamBank.com](mailto:mbasque@NeedhamBank.com) for an invitation.
- 6:15 **Meet in Lobby for Trolley**  
 7:00 - 9:00 **Yacht Outing - Clearwater Beach Marina**  
 Bon Voyage! Come join us for a sunset cruise on the Gulf. Mingle with Partners, Identifi Employees and you peers, enjoy dancing and the best seafood Florida has to offer.

### Friday, Oct 25<sup>th</sup>

- 8:00 -9:00 **Breakfast - Island Room II**  
 9:00 - 10:30 **Roundtables - Island Room II**  
 Sit down with key Identifi employees from Support, Development, Implementation and Professional Services for this interactive session. Take part in discussion and ask questions about how to better use your Identifi solutions.
- 10:30 - 1:00 **End User & Advanced Training - Beach/Gulf Rooms**  
 Identifi's Trainers are back for an afternoon of tips, tricks & how-tos. Choose one of two great tracks: 101, which will cover key Identifi features like scanning, indexing, esigning & searching. 201, will show more advanced features and time-savers that long-time Identifi users will find helpful.
- 1:00 - 2:00 **Lunch & Farewell**