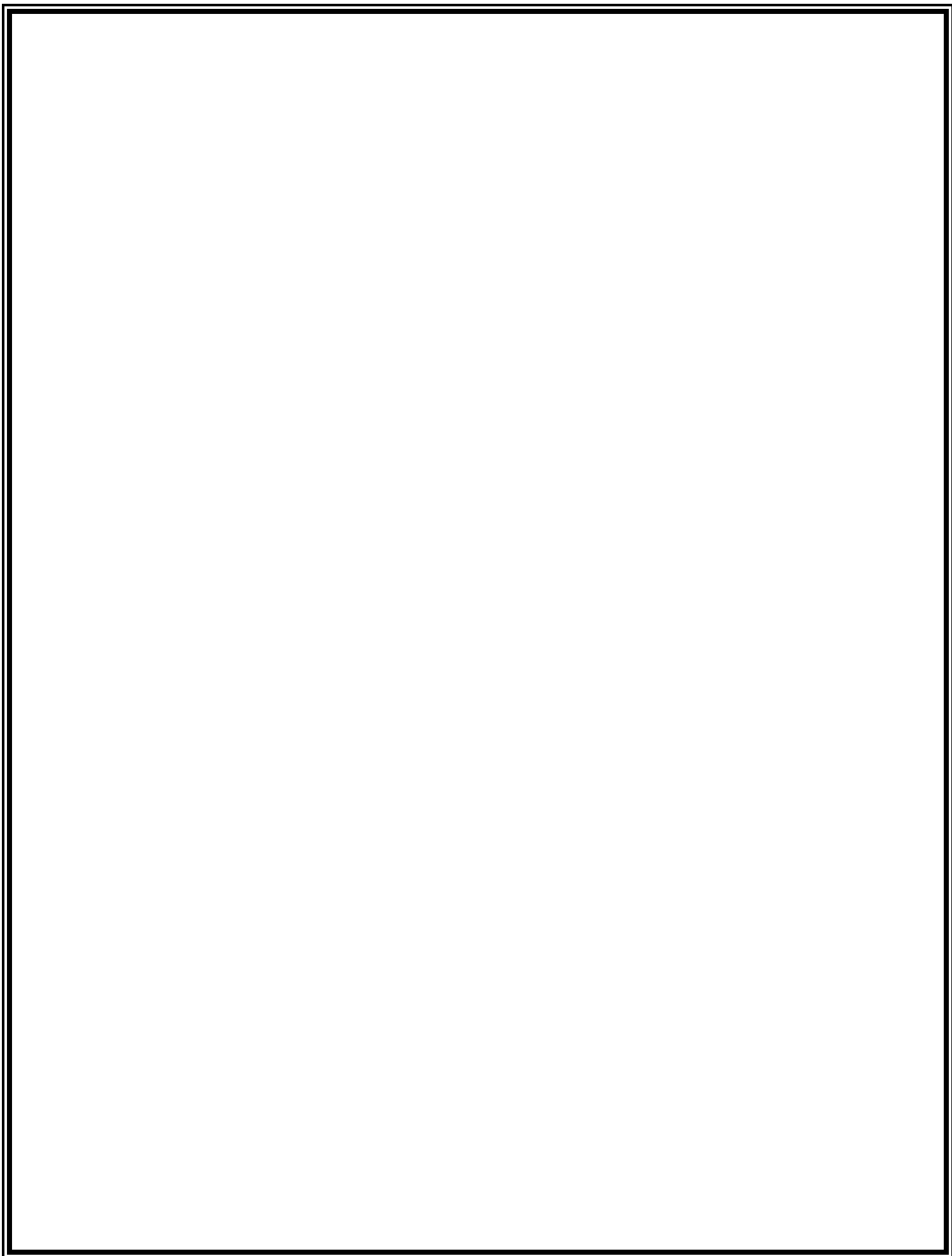


# CFO CONFERENCE

**Friday, November 15, 2013**  
**Renaissance Woodbridge Hotel, Iselin, NJ**

**Presented By:**





**CFO CONFERENCE**  
**Renaissance Woodbridge Hotel, Iselin, NJ**  
**Friday, November 15, 2013**

**Conference Sponsor: [Peapack-Gladstone Bank](#)**

- 8:00 a.m. – 8:50 a.m.    **Registration / Continental Breakfast**  
Sponsored by: [The Valley View Group](#)
- 8:50 a.m. – 9:00 a.m.    **Welcome / Introduction**  
**Dennis M. Spinelli**, Senior Director  
BDO USA LLP
- 9:00 a.m. – 9:50 a.m.    **Economic Update**  
**James W. Hughes Ph.D.**, Dean  
Edward J. Bloustein School of Planning and Public Policy  
Rutgers University
- 9:50 a.m. – 10:40 a.m.    **Accounting / Tax Update**  
**Barry M. Pelagatti**, Partner  
BDO USA LLP
- 10:40 a.m. – 11:00 a.m.    **Break**  
Co-sponsored by: [McGladrey](#)
- 11:00 a.m. – 12:00 p.m.    **Regulatory Panel**  
**Richard Poliner**, Chief Examiner for Applications  
New Jersey Department of Banking & Insurance
- Melissa Scofield**, Assistant Deputy Comptroller  
Office of the Comptroller of the Currency
- Gregory P. Wyka**, Assistant Regional Director  
Federal Deposit Insurance Corporation
- 12:00 p.m. – 12:45 p.m.    **Luncheon**  
Sponsored by: [The Valley View Group](#)
- 12:45 p.m. – 1:35 p.m.    **Interest Rate Risk Models**  
**Michael Fasone**, CRP, President  
Bank Reporting Sciences

**NEW JERSEY BANKERS ASSOCIATION  
FINANCIAL MANAGERS SOCIETY  
Friday, November 15, 2013  
Renaissance Woodbridge Hotel**

**SPEAKER BIOGRAPHIES  
(In Order of Appearance)**

**Dennis M. Spinelli  
BDO USA LLP**

Dennis M. Spinelli is a senior director in the Tax Services group and has more than 25 years of experience providing tax services. In his career, he spent 13 years as a senior vice president and director of Corporate Tax at Summit Bank. Under Spinelli's direction, Summit Bank implemented tax planning initiatives that generated earnings in excess of \$300 million. Before his tenure at Summit Bank, he spent three years in the corporate tax department of Midlantic Bank and two years working for a large national CPA firm.

Spinelli has extensive experience with taxation and issues pertaining to corporations, partnerships and limited liability companies. He provides tax and advisory services to clients across a diverse range of industries with an emphasis on financial institution clients. In addition, Spinelli provides consulting and tax planning with particular emphasis on accounting methods, entity structure, mergers, acquisitions, restructurings, stock compensation and consolidated return issues.

Spinelli received his B.A. in accounting, Rutgers University and his M.S. in taxation, Pace University.

**James W. Hughes Ph.D.  
Edward J. Bloustein School of Planning and Public Policy  
Rutgers University**

Dr. James W. Hughes is the dean of the Edward J. Bloustein School of Planning and Public Policy at Rutgers University, appointed to that position in 1995, and has been a member of the faculty since 1971. In addition, since 1988, he has also been the director of the Rutgers Regional Report which, during its 25-year tenure, has produced 37 major economic/demographic/housing studies on New Jersey and the New York region.

Hughes is a nationally-recognized academic expert on demographics, housing, and regional economics, and was a contributing editor to the magazine *American Demographics*. He is author or co-author of 33 books and monographs and more than 150 articles, generally focusing on housing, demographics and economic development patterns. Among these are *The Atlantic City Gamble* (published by the Harvard University Press), *The Dynamics of American Housing*, *America's New Market Geography*, and *America's Demographic Tapestry: Baseline for the New Millenium* (published by the Rutgers University Press).

Hughes has provided extensive budgetary and economic testimony before many New Jersey State Legislative committees, and has provided numerous policy briefings both in Washington and Trenton on demographics, housing and the economy. He was a Distinguished Fellow of the National Association of Industrial and Office Properties (NAIOP), and has been awarded the Warren Hill Award of the New Jersey Bankers Association, the Rutgers' Richard P. McCormick Award for Excellence in Alumni Leadership, the Rutgers Presidential Award for Distinguished Public Service, as well as the Distinguished Service Award of the New Jersey Chapter of the American Planning Association. He has been both a Woodrow Wilson and Ford Foundation Fellow and has served as a consultant to numerous federal, state and local public bodies as well as to many private and corporate clients.

Hughes was recently a member of Governor Christie's Housing Opportunity Task Force. In the past, he was on the NJ Governor's Commission on Jobs, Growth and Economic Development, and the Governor's Logistics Council. He was on the Real Estate Task Force of the Governor's Economic Master Plan Commission and was a member and trustee of the successor commission: Prosperity New Jersey. He formerly was on the board of the E'Town Corporation (NY Stock Exchange) and the board of the Cali Real Estate Investment Trust (NY Stock Exchange). He was also a member of the board of advisors of the Mack-Cali Real Estate Investment Trust (N.Y. Stock Exchange). He has also served on numerous other boards and task forces, including the board of directors of the Cooperative Housing Foundation (Washington, DC), the Economic Advisors Board of the Council of the City of New York, the (New Jersey) Governor's Property Tax Commission, and the (New Jersey) Governor's World Class Economy Task Force.

**Barry M. Pelagatti**  
**BDO USA LLP**

Barry M. Pelagatti is a partner at Assurance with more than 19 years of experience. Specifically, his responsibilities include financial statement review, consultation on complex accounting and reporting matters, including mergers and acquisitions, capital market transactions and SEC reporting requirements.

Pelagatti has developed programs that advised clients on improving overall operating efficiency and reporting practices with regard to Section 404 of the Sarbanes-Oxley Act, Internal Controls Over Financial Reporting and Basel III.

**Richard Poliner**  
**New Jersey Department of Banking & Insurance**

Richard Poliner has been chief examiner of the New Jersey Department of Banking and Insurance. He has held this position since 2009 and is responsible for applications, corporate filings and GUDPA. During this time he represented the Commissioner on the board of the Economic Development Authority. He had a leading role in the development of the automated GUDPA system after passage of the GUDPA amendments in 2010. From 2000 to 2008, Poliner was the managing examiner for the Northern Region.

Prior to joining the Department, Poliner held positions in the industry including director - Mortgage Banking Systems and accounting management positions in savings and loan associations and mortgage companies where he was involved in financial reporting, loan servicing, systems design, implementation, and testing.

**Melissa Scofield**  
**Office of the Comptroller of the Currency**

Melissa Scofield is an Assistant Deputy Comptroller out of the New York Field Office - Edison, NJ, where she supervises community banks and federal thrifts located in northern New Jersey, New York City, the Hudson River Valley, Long Island, and Connecticut.

Scofield joined the OCC in 1981 as a field examiner in the New York Metro area, where she worked in community, mid-sized, and large multinational banks, as well as federal branches of foreign banks. She is a commissioned National Bank and Federal Savings Association Examiner. Scofield has served in various bank supervision roles throughout her more than 32 year career with the OCC, including field examiner, problem bank Examiner-in-Charge, Senior Field Office Analyst, Large Bank resident Examiner, Mid-sized Bank Examiner-in-Charge, and Assistant Deputy Comptroller. In addition, she is active in the examiner recruitment and hiring process, and serves as an instructor for OCC training courses.

Scofield graduated from Rutgers University with a B.S. in economics, and resides in Branchburg, New Jersey with her husband and two children.

**Gregory P. Wyka**  
**Federal Deposit Insurance Corporation**

Gregory P. Wyka joined the FDIC in June 1975 as a Bank Examiner in the FDIC's New York region. He was appointed to the position of Assistant Regional Director in August 1987. He is presently responsible for all FDIC-insured institutions domiciled in New Jersey. He also supervises the region's Bank Secrecy Act, Anti-Money Laundering, Bank Fraud, and Capital Markets functions.

Wyka graduated from Manhattan College receiving a Bachelor of Science - business administration degree, with an economics major. He also holds a graduate banking degree from the National School of Finance and Management, at Fairfield University. He completed the Basel Committee on Banking Supervision's International Banking Supervisory Course in Basel, Switzerland.

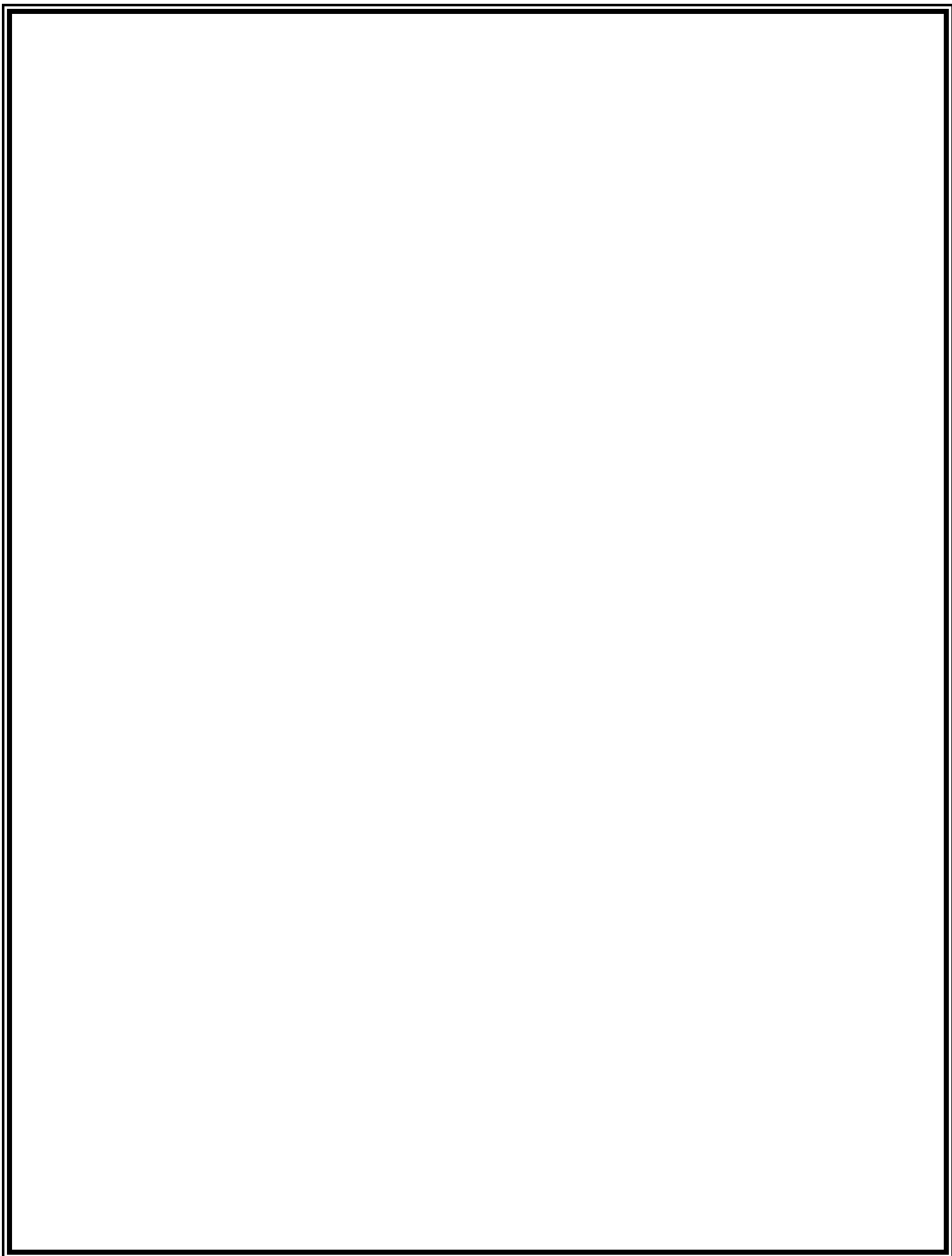
**Michael Fasone**  
**Bank Reporting Sciences**

Michael Fasone is the president and founder of Bank Reporting Sciences. He is an asset/liability management expert with 22 years of experience working primarily with community banks. Fasone's primary responsibilities are guiding the firm's overall strategic direction, cultivating strategic alliances, and ensuring BRS' high standards of client care, technical leadership, and product quality.

Prior to starting BRS, Fasone was with Olson Research Associates, Inc. for 8 years. As the manager of processing services, Fasone was the principal designer of Olson's asset/liability management modeling and processing software, and the manager of the client support staff.

Fasone is 43 years old and has a B.S. in Business Administration from the University of Maryland's School of Business and an M.S. in information technology from the University of Maryland, University College. He is a frequent guest speaker at clients' board and ALCO sessions, and is highly sought out for his ability to communicate complex information in a manner that is easy to understand.

In October of 2002, in recognition of his experience and credentials in the field of asset/liability management, Fasone was awarded the Certified Risk Professional (CRP) designation by the BAI Center for Certifications as a charter member. The Certified Risk Professional is the premier professional designation dedicated to promoting standards of excellence in the area of risk management in the financial services industry. He received the charter member CRP designation in treasury/asset & liability management.





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