

**EFTA eFinancial Enablers Council Meeting  
March 23 & 24, 2010**

Hosted by: Qualcomm  
5565 Morehouse Dr, Building T  
San Diego, CA 92121-1710

**March 23, 2010**

**7:00 PM – 9:00 PM**     Dinner     Restaurant TBD

**March 24, 2010**

**8:00 AM**     Continental Breakfast

**8:30 AM**     Welcoming and Approval of Minutes     Charlie Kroll

**8:45 AM**     Presentation – Qualcomm     Speaker TBD  
*Trends in the wireless industry*     Qualcomm

**9:30 AM**     Presentation – Glenbrook Partners     Russ Jones  
*The Evolution of Alternative Payments*     Glenbrook Partners

**10:15 AM**     Break

**10:30 AM**     Presentation – The Bankers' Perspective     Jill Barnes – President, Retail  
*Trends For 2010*     Tom Honan – SVP/CIO  
Capital Source Bank

Jim Morrell – CIO  
*iQ Credit Union*

**11:30 AM**     Presentation – EFTA     Kurt Helwig  
*Government & Regulatory Update;*     President & CEO  
*Discussion of EFTA / eFEC Relationship*     EFTA

**12:30 PM**     Break & Working Lunch

**12:45 PM**     Overview and Formation of Security Task Force     Dinesh Sheth

**1:15 PM**     eFEC Future Topics and Priorities     Maria Arminio  
Avenue B Consulting

**1:30 PM**     Membership     Matt Lawlor

**1:45 PM**     New Business     Charlie Kroll

**2:00 PM**     Adjourn

*As a courtesy to others, please arrange your travel so you can participate in the entire program.*



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### Online Registration (Preferred):

1. Visit <https://www.efta.org/registration.php?id=39>
2. Click "Current members please login here before registering"
3. Enter your email address and the password "welcome"
4. Confirm your contact info, fill out the payment details, and submit

If you will be attending the dinner, please RSVP via email to [MelanieRenner@efta.org](mailto:MelanieRenner@efta.org)

### Paper Registration (Not Necessary If Registered Online):

Please return this form to EFTA at (703) 934-6058.

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Company: \_\_\_\_\_

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

### **Registration Fee and Form of Payment:**

- Check enclosed made payable to EFTA for \$395
- Charge my credit card \$395 (Visa, MasterCard, American Express, or Discover)

Credit Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Name of Cardholder: \_\_\_\_\_

Signature of Cardholder (REQUIRED): \_\_\_\_\_

**Please put a check mark next to the events you will be participating in.**

- March 23 eFEC Dinner
- March 24 eFEC Meeting

**\*\*Cancellation Policy – In order to receive a refund, cancellations must be received in writing no later than March 17<sup>th</sup>.**

**Hotel Suggestions (ask for Qualcomm corporate rate)**

HYATT REGENCY LA JOLLA  
3777 La Jolla Village Dr,  
858-552-1234

HILTON LA JOLLA TORREY PINES  
10950 No. Torrey Pines Rd  
858-558-1500

MARRIOTT SAN DIEGO LA JOLLA  
4240 La Jolla Village Dr  
858-587-1414

## Speaker Bios

### **Jim Morrell, iQ Credit Union**

Jim Morrell is Chief Information Officer at iQ Credit Union in Vancouver, Washington. iQ Credit Union has 43,000 members, and is one of the leading technology-oriented credit unions. Jim oversees the areas of payment systems, facilities, information systems, and the institution's strategic planning.

Jim was recognized as the "2008 Information Technology Executive of the Year" by Credit Union Times. He is a frequent speaker for topics ranging from strategic planning, innovation, organizational communication, and future technology trends.

Jim is a former participant of the Filene Research Institute's i3 Group, a team that focuses on innovations for the credit union industry. He is a member and past-Chair of the Credit Union National Association Technology Council, a leading voice of technology for the credit union industry. Other involvement includes the Client Advisory Council for Online Resources and Symitar's Operations Council.

### **Russ Jones, Glenbrook Partners**

Russ is an industry pioneer in the commercial use of Internet technologies. He offers clients a strong background in strategy development, market development, and product management. Russ tracks emerging payment technologies and lectures throughout the world on ecommerce technologies, Internet business models, online marketing strategies and emerging payment solutions.

Before joining Glenbrook, Russ was a general partner with The NuVantage Group, an innovation-to-market consulting group, where his clients included CommerceNet and the Financial Services Technology Consortium (FSTC). Earlier, he served as director of emerging technologies for Compaq's corporate research group, where he oversaw the development of the MilliCent micropayment system.

### **Jill Barnes, CapitalSource Bank**

Ms. Barnes is President of the Retail Bank (22 branches, \$4B deposits), bringing with her 25 years of financial leadership experience. Most recently, she successfully transitioned the Retail Bank of Fremont Investment & Loan to CapitalSource Bank. Prior to joining Fremont, Ms. Barnes was Executive Vice President and Chief Operating Officer, Consumer Banking at IndyMac Bank, responsible for all business and support units within the Retail Banking Division.

Earlier in her career, she held several senior operations and sales assignments at Home Savings of America. She joined as Manager in the Corporate Training Department and later relocated to New York to manage the conversion of the 35 branch network of Bowery Savings Bank into Home Savings.