BISA Bank Insurance & Securities Association

Are You A Trend Setter?

Instead of Following the Trend, Be The Person to Define The Trend!

Maree Moscati, CEO Copytalk, LLC
Keena Pettijohn, Enterprise New Business Development

2018 ANNUAL CONVENTION

MARCH 6-9 ▪ THE DIPLOMAT BEACH RESORT ▪ HOLLYWOOD, FL

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YOUR SECURITY IS PARAMOUNT

Maree Moscati, CEO
Copytalk, LLC

Maree Moscati is nationally renowned within the financial services industry. For over thirty years she has coached financial professionals reach and exceed goals by sharing her vast experience in our industry.

Maree is a graduate from Laboratory Institute in New York City with a degree in business and finance, and completed all certified financial planner courses at Florida State University. She holds FINRA Series 24, 7 & 63 licenses, as well as a Florida Life, Health & Variable Annuity license. She also carries the Shared Assessments Certified Third Party Risk Professional (CTPRP) Certification. Her long and very distinguished career ranged from Financial Advisor, Regional Sales Manager to President & CEO of Trust/Wealth Management.

Today, Maree Moscati is the CEO of Copytalk, an innovative company that improves documentation of client meetings, enhancing compliance, efficiency, and productivity. She has led her firm to become the premier secure mobile dictation firm for hundreds of prominent financial institutions. Copytalk strives to continually stay above industry standards as it relates to security and privacy protocols demanded from the prominent financial firms we support. Our Enterprise Corporate clients recognize this certification sets Copytalk apart and assures them of our commitment to their Third Party Vendor Risk Management platform. Maree Moscati, CEO of Copytalk joins only a handful of woman CEOs to obtain this distinguished designation.

She's been featured on Good Morning America, the Travel Channel with Andrew Zimmern, Steve Crawley's Money ProNews Report and Focus on South Florida. Her articles on finance have appeared in the Sun Sentinel and Miami Herald.

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Keena B. Pettijohn

Strategic Partner and Enterprise New Business Development Executive

Accomplished **Wealth Management Executive** with over 25 years in Financial Services, Private Banking, Financial Planning and Trust Solutions in the Bank, Credit Union, and RIA distribution Channels. Solid Wealth Leader and Innovations Pioneer with experience in FinTech Solutions, CRM, Social Media Marketing and Selling Saas. A thought leader that has leveraged technology to offer Investment, Insurance and Banking products that has transformed the way these products and services are experienced by the client. Coordinated strategic initiatives that utilized automated Social Media Marketing Software, Financial Planning software, and CRM software. Adept at leveraging Customer Relationship Data software to integrate Marketing, increase prospecting, drive adoption and advocacy levels and increase revenue.

A graduate with Honors from The Ohio State University(OSU) with concentration in Marketing and Finance, Keena is currently a full-time resident of Southeast Florida, having been based in Manhattan and the Northeast market for most of her professional life. When not focused on building out Enterprise Solutions in the Wealth Management area for Financial Institutions, Keena allocates her time and passion to the Therapeutic Riding programs for Para-riders and Equine Rescue Associations.

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Do you follow Trends?
Are you leveraging technology?

- CRM
- Financial Planning
- Portfolio Management
- Robo Platform
- Risk Tolerance
- CyberSecurity
- AI
- Account Aggregation

Technology changes at the speed of light

- Fintech collaboration
- Leveraging & Harnessing Technology
- Artificial Intelligence/Algorithm
- Financial Planning Software

Where's the EMOJI?

- Are you all machine & no emotion?
- Is technology controlling you, your recommendations and your presentations?
- Does tech make you more robotic?
- Never has a CRM made a sale!
- Does technology ENHANCE or DISPLACE your client experience?

What sets you apart as an Advisor?

- When you LEVERAGE technology ~
- Do you use it to harness efficiencies?
- And can you scale those efficiencies?
- How relevant are you to your clients?

High Touch: High Tech:

- Will the trend make me a better advisor?
- Does technology allow my to KYC (Know Your Client) better?
- Does technology capture the essence of the value of your client meetings?
- How do you memorialize client calls and conversations?

The Personalization of technology:

- Utilize new technology with old fashion values
- Machines cannot emotionalize client's core values
- Devote your time to client's needs and know your client

Will you Be the Trend like everyone else, or will you be the person to Define the Trend?

People won't care how much you know until they know how much you care.

Theodore Roosevelt

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