



2025 ALM First Financial Forum Kicks-Off, Welcoming Over 200 Financial Professionals

For Immediate Release: September 23, 2025

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BANFF – The 2025 ALM First Financial Forum kicked off yesterday at the Fairmont Banff Springs nestled in the breathtaking Canadian Rockies. Highlights from the first day of this industry-leading, three-day conference included an inspiring keynote session on *Five Practices that Make Leadership Work* presented by Dr. Jamie Leddin and the latest Economic & Market Update tailored specifically to financial institutions by Jason Haley, ALM First’s Chief Investment Officer.

By interpreting economic indicators and market conditions, Haley shed light on factors likely to influence depository performance in the year ahead. Haley’s insights highlighted that economic fundamentals are still sound despite the noise and depository institutions have exhibited strong financial performance—with net interest margins at two-decade highs—amidst volatility. Continued discipline in management practices and risk-mitigation strategies will be critical to sustaining performance.

Yesterday also included a general session on *Strategic Crossroads: Leading through Uncertainty*, along with *Looking Back, Leading Forward: Open Forum with ALM First’s Executive Team*, which gave attendees an opportunity to engage with the firm’s principals through an interactive Q&A discussion on the top financial and non-financial concerns impacting depositories.

This year, over 200 financial professionals are attending the sold-out conference, which was designed to be the premier event for financial executives to discover insights, formulate strategies, and gain new perspectives about the coming year.

Today, two separate education tracks, led by a variety of industry experts, will deliver custom-tailored sessions to Executives and Board Members. These sessions will cover a wide range of topics including asset liability management, interest rate risk, enterprise risk management, governance, and more.



Learn more about the educational resources ALM First offers by visiting www.almfirst.com.



About ALM First

ALM First was founded in 1995 as a strategic partner for depositories, offering an array of financial advisory services. The firm's expertise in asset liability management, investment management, balance sheet strategy, secondary market solutions, and specialty financial services, has allowed it to deliver deeper insights into financial institutions' balance sheets, strengthening their performance and building efficiencies. With over \$74 billion of investments under management (as of June 30, 2025), ALM First Financial Advisors is an SEC-registered investment advisor, acting as an unbiased third party, offering commission-free, fee-based services to over 300 financial institutions across the country.



In recent years, ALM First Group has expanded to include several wholly-owned subsidiaries including DDJ Myers, an ALM First Company and ALM First Executive Benefits, LLC. Driven by client needs, the firm now offers various services to help financial institutions optimize their greatest assets – their people.

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