



2025 ALM First Financial Forum Wraps-Up with Insights on Growth, Regulatory Change and Strategic Thinking

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Contact: Sharon Simpson, (240) 620-4095 or sgsimpsonconsulting@mac.com

BANFF – The 2025 ALM First Financial Forum wrapped up on Wednesday after three days of engaging sessions focused on driving organizational success amidst the inspirational backdrop of the Canadian Rockies.

During the final day of the conference, panel discussions featuring industry experts and practitioners shared insights regarding the changing regulatory environment and growth strategies. These interactive sessions highlighted topics like stablecoin and the GENIUS Act, the future of branch strategy, managing strategic risk associated with regulatory changes, and mergers and acquisitions.

To close out this year's Financial Forum, Peter Myers, Senior Vice President of DDJ Myers, an ALM First Company, presented *The Crises in Strategic Thinking*. The session highlighted today's evolving workforce dynamics, including the rise of Gen Z, the impact of retiring managers and the knowledge gaps left behind.

This year, over 200 financial professionals attended the sold-out conference, which was designed for everyone involved in managing or monitoring the balance sheet to discover insights, formulate strategies and gain new perspectives as they prepare for the coming year.

In addition to the 2025 Financial Forum's general sessions, two separate education tracks, led by a variety of industry experts, delivered custom-tailored sessions to Executives and Boards. These sessions covered a wide range of topics, including navigating a changing regulatory environment, optimizing profitability, implementing strategic risk management, and developing leadership readiness, with tailored sessions for executives and boards. Explore all of the educational resources ALM First offers by visiting almfirst.com and mark your calendars for the 2026 ALM First Financial Forum, which will be held next September in



Austin, TX at the Four Seasons Austin. Financial professionals interested in attending the 2026 conference are encouraged to complete an [Early Interest Form](#) and plan ahead to join ALM First next year.

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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