

The Evolving Financial Landscape:

Perspectives from North Carolina's CPA and Bankers Association CEOs

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Overview

-  **Key shifts reshaping our industries
(regulatory/legislative and technology)**
-  **Strategies for future success**
-  **Role of associations in navigating change**

The Big Picture: Forces Reshaping Our Professions



Legislative & Regulatory Volatility

Rapid Technology Innovation

Workforce Evolution

Demand for Trust, Speed & Personalization

Technology Transformation: More Than Just Tools

AI Integration

Risk | Efficiency | Strategic Insight

Cybersecurity

Protecting critical financial data and systems from evolving cyber threats

Upskilling

Automation & Efficiency

Leveraging technology to streamline routine tasks and free up time for higher-value activities

Banking's Digital Evolution



Fintech Disruption



Digital-First Customer Expectations



Balancing Innovation and Trust

**“Professionals won't be replaced
by AI—those who use AI well will
lead.”**

Legislative & Regulatory Changes on the Horizon

- CPA Licensure Modernization
- Shifting Tax Policies
- Workforce Policy Impact
- Risk & Compliance Landscape
- Data Security Regulation

Why Advocacy Matters More Than Ever



Proactive vs. Reactive Positioning

Association Voice =
Protection + Opportunity

Collective Strength =
Legislative Influence

Staying informed and proactive is no longer optional. It's essential to survival and success.

Building the Future: Talent, Leadership, and Collaboration

- **Talent Expectations**

Access, Inclusion & Belonging

Flexibility and Purpose-driven Careers

- **Leadership Adaptability**

- **Opportunities for CPA-Bank Partnerships**



How Associations Support Transformation



Create Ecosystems of Learning and Connection



Advocate for a Sustainable Future



Empower Next-Generation Leadership

Interactive Q & A