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

Al 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 Al—those who use Al 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

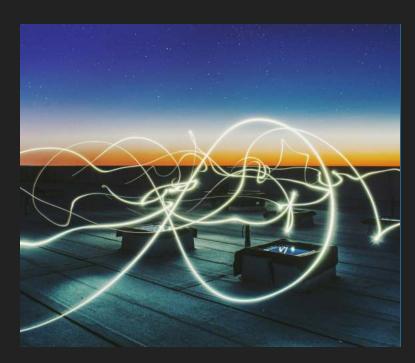
Staying informed and proactive is no longer optional. It's essential to survival and success.

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