

## Winston Hosts 2026 Financial Services Symposium in Charlotte

JANUARY 29, 2026, 9:30 AM - 6:00 PM

Winston's Financial Services Industry Group is pleased to host our 3rd Annual Financial Services Symposium. This year the event includes a full day of programming led by top industry thought leaders.

Our keynote speaker, Chris DeSantis, an independent organizational behavior practitioner, speaker, podcast host of Cubicle Confidential, and author of *Why I Find You Irritating: Navigating Generational Friction at Work*. Chris will share insights on understanding, appreciating, and leveraging generational perspectives to benefit our companies and teams. Below you will find the full agenda.

### FinTech, Banking & Payments Sessions

#### Panel 1: Lending | 10:00 a.m. – 11:00 a.m.

Discuss the latest trends in lending, including private credit markets, structured finance, and more.

##### **MODERATOR**

- Jordan Klein, Co-Chair, Financial Services Industry Group; Co-Chair, Asset-Based Lending Practice, Winston & Strawn LLP

##### **PANEL**

- Aaron Benjamin, Partner, Global Finance, Winston & Strawn LLP
- Lindsey Kell, Partner, Global Finance, Winston & Strawn LLP
- Jason Bennett, Co-Chair, Asset-Based Lending Practice, Winston & Strawn LLP

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#### Panel 2: FinTech & Digital Assets | 11:00 a.m. – 12:00 p.m.

Explore this rapidly evolving sector with discussions on the GENIUS Act, litigation trends, regulatory compliance, supervision and enforcement, and more.

## **MODERATOR**

- Juan Azel, Chair, FinTech, Banking, and Payments Group, Winston & Strawn LLP

## **PANEL**

- Steve Aquino, General Counsel, Mesh Pay
- Jesse Honigberg, EVP, Product and Platforms, Customers Bank
- Amy Pugh, General Counsel, Green Dot
- Carl Fornaris, Chair, Financial Innovation & Regulation Practice, Winston & Strawn LLP
- Yulia Makarova, Partner, Financial Innovation & Regulation Practice, Winston & Strawn LLP

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## **Keynote Speaker & Lunch**

Join us for an interactive session with [Chris DeSantis](#), an independent organizational behavior practitioner, speaker, podcast host of *Cubicle Confidential*, and author of *Why I Find You Irritating: Navigating Generational Friction at Work*. Chris will share insights on understanding, appreciating, and leveraging generational perspectives to benefit our companies and teams.

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## **Regulatory, Enforcement & Investigations Sessions**

### **Panel 3: Litigation Hot Topics | 1:45 p.m. – 2:15 p.m.**

Review the year's most consequential disputes in financial services. The panel will distill emerging trends, key court decisions, and practical defense and risk-mitigation strategies to help institutions anticipate what's next.

## **PANEL**

- Elizabeth Ireland, Partner, White Collar & Government Investigations, Winston & Strawn LLP
- Stacie Knight, Of Counsel, Complex Commercial Litigation, Winston & Strawn LLP

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### **Panel 4: Government Enforcement | 2:15 p.m. – 3:15 p.m.**

Explore the latest trends from the Department of Justice and other regulatory bodies overseeing financial services companies. This panel will cover the government's key priorities, including investigations into alleged debanking practices, anti-money laundering (AML) issues, compliance with know your customer (KYC) regulations, and asset recovery initiatives.

## **MODERATOR**

- Jack Knight, Chair, Financial Services Litigation Practice, Winston & Strawn LLP

## **PANEL**

- Russ Ferguson, US Attorney for the Western District of North Carolina

- Jack Cobb, Assistant General Counsel and Executive Director, Wells Fargo; Former Senior Litigation Counsel, CFPB

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## Panel 5: Implementing AI Governance and Compliance Programs: Key Considerations for 2026 | 3:15 p.m. – 4:15 p.m.

Explore and confront the risks of AI as experts unpack cutting-edge use cases, emerging legal and ethical frameworks, and practical governance for responsible deployment.

### **MODERATOR**

- Patrick Doerr, Partner, White Collar & Government Investigations, Winston & Strawn LLP

### **PANEL**

- Eric Robinson, Vice President/Managing Director, Global Advisory Services & Strategic Solutions, KLDiscovey
- Bobby Malhotra, Chair, eDiscovery and Information Governance Practice, Member, Artificial Intelligence Strategy Group, Winston & Strawn LLP
- Lance Morley, Senior Associate General Counsel, LendingTree

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## Rooftop Reception | 4:00 p.m. – 6:00 p.m.

[Register for the Symposium here.](#)

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## Speakers

[Juan Azel](#)

[Aaron J. Benjamin](#)

[Jason Bennett](#)

[Kobi Kennedy Brinson](#)

[Patrick Doerr](#)

[Carl Fornaris](#)

[Elizabeth Ireland](#)

[Lindsey Kell](#)

[Jordan Klein](#)

[Jack Knight](#)

[Stacie Knight](#)

[Yulia Makarova](#)

[Bobby Malhotra](#)

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## Event Information

Kimpton Tryon Park Hotel  
303 S. Church St.  
Charlotte, NC 28202

[Register Here](#)

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## Related Locations

[Charlotte](#)

## Related Capabilities

[Financial Services Litigation](#)

[Financial Innovation & Regulation](#)

[White Collar & Government Investigations](#)

[Financial Services](#)

[FinTech, Banking & Payments](#)

[Artificial Intelligence \(AI\)](#)

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## Related Professionals



[Juan Azel](#)



[Aaron J. Benjamin](#)



Jason Bennett



Kobi Kennedy Brinson



Patrick Doerr



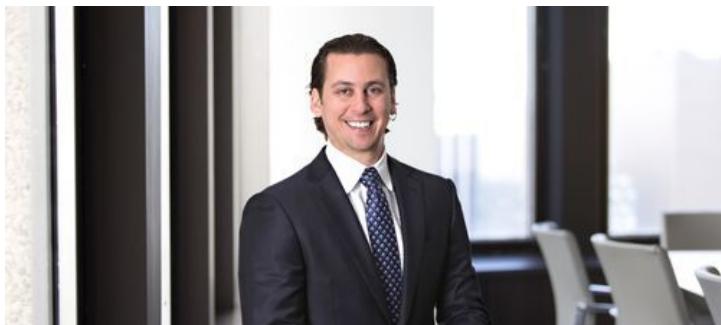
Carl Fornaris



Elizabeth Ireland



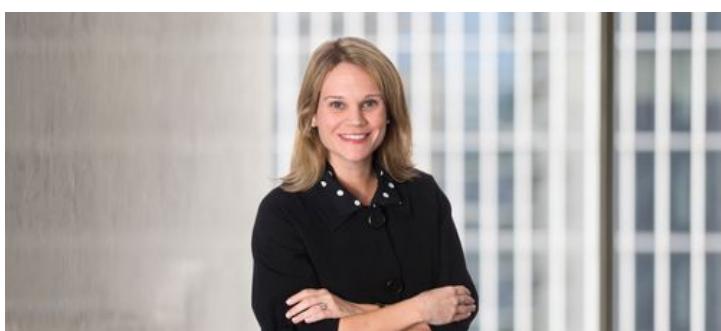
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