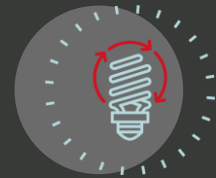


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EXCHANGE > 2025





# A Tactical Guide to Growing Your Merchant Services Portfolio (and Beyond)

## **Casey Crowell**

SVP - Treasury Solutions  
The Bank of Missouri

## **Jessie Denny**

SVP, Director - Merchant  
Services, TowneBank

## **Michael Guiliano**

SVP, Manager – Product  
Management  
Zions Bancorporation

## **Cindy Blackstone**

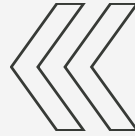
VP – Strategic Partnerships  
Deluxe

## **Sarah Humphrey**

Director of Sales – Merchant  
Services, Deluxe



# About Me



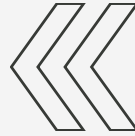
## Casey Crowell

- » SVP, Treasury Solutions
- » Joined The Bank of Missouri in 2013
- » Leads Treasury Sales and Merchant Services





# About Me



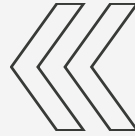
## Jessie Denny

- » Director and SVP, Merchant Services
- » Oversees strategy and development focusing on market penetration, member experience and revenue growth.
- » 18+ years of financial services experience



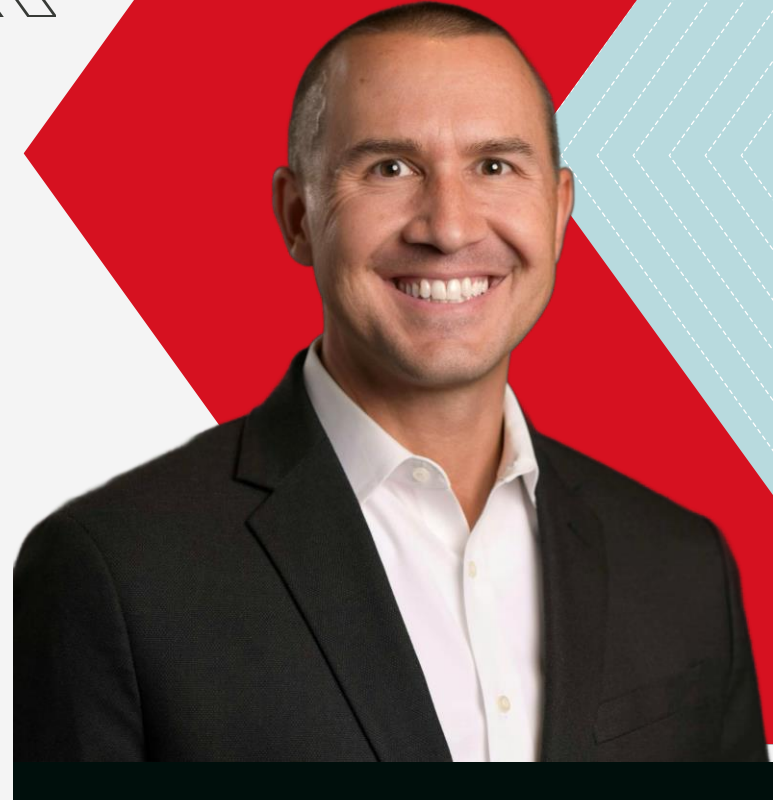


# About Me



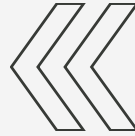
## Michael Guiliano

- » SVP and Manager of Product Management
- » Leads development and delivery of customer-centric solutions
- » 15+ years experience in the fintech and payments industry





# About Me



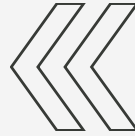
## Cindy Blackstone

- » VP, Strategic Partnerships
- » 25+ years of experience in banking and payments
- » Joined Deluxe in 2023





# About Me



## Sarah Humphrey

- » Director of Sales
- » Seasoned payments expert with 15 years in banking, specializing in Treasury Management and overseeing merchant service programs.
- » Transact 40 under 40 award recipient





# Merchant Services

Understanding the importance for FIs



# Past: Building the Portfolio



# Present: Portfolio Management, Retention and Attrition



# Future: Innovating Merchant Services for What's Next



# A Tactical Guide to Growing Your Merchant Services Portfolio (and Beyond)

## Executive Summary

» In this session, you learned:

- Strategic Growth Approaches
- Portfolio Management & Retention
- Automation & Efficiency
- Future Innovations