

How Do the Groups Work?

- CBAI organizes the groups based on bank size and market to ensure that members have as much in common as possible without being competitors.
- Members do NOT required the title of Branch Manager to participate.
- Other consultants from a variety of firms may be invited to address the group. This expertise would cost thousands of dollars if you had to pay for it on a "real-time" basis.
- Anywhere from six to eight issues are discussed at each session and are member-selected.

Member Review

"The Branch Manager forum is a wonderful opportunity for networking and resources. I look forward to our quarterly meetings to connect with others that may be experiencing similar challenges, to offer others guidance and perspective where I can and to learn about various relevant topics."

*Hillary Torrance, AVP of Operations
Firsty State Bank, Mendota*

"The Branch Manager Group Meetings with CBAI have been a great way to network with my peers. Having a group of like minded community bankers to bounce ideas and issues off of has been a valuable resource in our ever changing industry."

*Tyler Hodge, VP/Regional Manager
New Holland Banking Center*

2025 Meeting Dates

Group A - Springfield

Wednesday, January 15, 2025

Wednesday, April 23, 2025

Wednesday, July 23, 2025

Wednesday, October 1, 2025

Group B - Utica

Wednesday, January 29, 2025

Wednesday, April 9, 2025

Wednesday, August 6, 2025

Wednesday, October 8, 2025

How Do I Register?

Return the registration form to one of the options below. The fee for the four quarterly meetings is \$1,099.



2025



800.736.2224



217.585.8738



WWW.CBAI.COM



CBAI
901 COMMUNITY DR
SPRINGFIELD, IL 62703

CBAI's Branch Manager Groups



Meet Your Facilitators

Springfield Location

As a member of Forvis Mazars, Heather Powell specializes in providing a full range of assurance services to banks. She manages engagement work performed by supervising and staff accountants. Powell has more than 17 years of public accounting experience. She is a member of the American Institute of CPAs and Illinois CPA Society. Heather also serves on the BKD Foundation board, which directs contributed funds to charitable organizations and organizes an annual officewide charitable project.

Utica Location

Jennifer Lafferty with Wipfli works with large and small financial institution clients to assess the effectiveness of their compliance policies, procedures, and practices. She is a member of the regulatory compliance team and has a strong background in Bank Secrecy Act (BSA) and deposit compliance as well as customer service, sales, and marketing. With nearly 20 years of experience in banking, Lafferty is well-versed in the industry's practices and procedures.

BRANCH MANAGER REGISTRATION FORM

I would like to participate in the following group:

Group A - Springfield

Group B - Utica

Name: _____

Title: _____

Bank: _____

Assets: _____

Address: _____

City/Zip: _____

Phone #: _____

Email: _____

(Email address required for registration.)

Please select your payment method:

Check Enclosed

Check in the Mail

Credit Card*

Name on Card: _____

Card #: _____

Exp. Date: _____

3-Digit Security Code: _____

*Visa, MasterCard & Discover accepted.

Sample Topics

The agenda each quarter is member-selected so any ideas or discussions are decided by those participating in the groups. Meetings begin by each member discussing key projects or tasks they are working on along with any exams or major items that have taken place at their banks since the last quarterly meeting. Other topics include:

- Networking discussions on key products, services and vendors
- Key regulatory issues that affect banks and ideas to best tackle the issue
- Hiring and firing of employees
- Staffing issues
- Vacation policies
- Work from home policies
- Policies stemming from Covid
- How to motivate employees
- Employee personnel issues: i.e., work attire, sample policies
- Sharing of sample forms
- Team and leadership motivation
- Sales techniques for employees
- Marketing ideas for the branch
- Emerging technologies in banking
- Discussions of bank examinations
- Sales incentive ideas/themes
- Bank promotion ideas
- Team meeting ideas
- Staff games/pep rally ideas
- What's working in branches, what isn't
- How to increase branch traffic
- Cybersecurity and cryptocurrency
- Any topic that the members would like to discuss