

The "C" Conference

Essential Training for C-Level Community Bankers



February 19, 2025

**Crowne Plaza
Springfield, IL**

CBAI's "C" Conference was developed for C-level community bankers including CEOs, COOs, CFOs and senior lenders. This exciting conference includes inspiring and educational general sessions, concurrent sessions and an excellent opportunity to network with your peers.

A complimentary Networking Session is being held February 18th from 6 - 9 p.m. at the Crowne Plaza bar on the second floor of the hotel.

CONFERENCE AGENDA

8 - 8:30 a.m.

Registration & Continental Breakfast

8:30 - 9 a.m.

Welcome & Association Update

Kraig Lounsberry, President

CBAI, Springfield, IL

9 - 10:15 a.m.

"Asset/Liability Management in Today's Environment"

Deon Perryman, Managing Director

The Baker Group, Oklahoma City, OK

10:15 - 10:30 a.m.

Break

10:30 - 11:45 a.m.

Networking Session

(Choose roundtable by area of interest.)

11:45 a.m. - 12:45 p.m.

Networking Lunch

12:45 - 1:45 p.m.

Concurrent Sessions

(Choose from two sessions.)

1:45 - 2 p.m.

Break

2 - 3 p.m.

"Critical Information for Community Bank Executives"

Greyson Tuck, Attorney & Consultant

Gerrish Smith Tuck, Memphis, TN

OPENING GENERAL SESSION

"ASSET/LIABILITY MANAGEMENT IN TODAY'S ENVIRONMENT"

Deon Perryman, Managing Director

The Baker Group, Oklahoma City, OK

Nearly three years ago, the Federal Reserve embarked on an aggressive tightening cycle to rein in inflation following the global pandemic. As we start 2025, the economy and the banking industry face renewed uncertainties, fueled by the recent election and more anticipated rate cuts by the Fed during the year. Senior management continues to navigate an environment marked by elevated interest rates and the looming threat of an economic downturn. This session examines and discusses all these concerns and present strategies to better prepare your institution for the uncertainty ahead. Topics include:

- An economic overview, outlook for the Fed & the latest yield curve behavior
- A look into industry trends for balance sheets, investment portfolio & performance
- Investment portfolio strategies for the current environment
- Best practices for ensuring regulatory compliance with interest rate risk & liquidity risk management

Deon Perryman, Managing Director with The Baker Group, one of the nation's largest independently owned securities firms specializing in investment portfolio management and interest rate risk management for community financial institutions. Perryman joined Baker in 2014, and his focus is liquidity management, regulatory guidance and investment portfolio strategy. His expertise is in assisting community institutions to develop an understanding of the current economic environment and to assist those institutions in utilizing that understanding to build business practices to best manage liquidity efficiently and improve value and earnings.

ROUNDTABLE NETWORKING SESSION

During this roundtable discussion, attendees have the opportunity to share ideas, issues and concerns regarding their area of interest or job title. This is another excellent opportunity to learn from your colleagues!

Attendees may select one of the following roundtables: *(Please make your selection on the Registration Form.)*

- Wealth Management
- Human Resources
- Chief Executive Officer
- Chief Financial Officer
- Chief Lending Officer
- Chief Operations Officer

NETWORKING LUNCH

Discuss your biggest challenges for 2025.

CONCURRENT SESSIONS - Choose from two sessions:

“DEVELOPING A CHANGE MINDSET”

Anne Schutt, VP of Business Development

Midwestern Securities Trading Company, East Peoria, IL

The world of banking is rapidly changing. It is impossible for business leaders who struggle to break from the past to follow new practices to succeed. Leaders must review their strategies that are obsolete and set new models that are relevant to present times. The shift must be viewed with positive effects to identify profitability, productivity and development prospects. And how does that leader then develop a change mindset with the rest of their institution, their board and even their communities? Many institutions have been serving their communities for over a century and the deep roots that have formed over those years can also slow progress and lead to a lack of innovation. Overcoming what is holding your institution back, while maintaining your brand identity in your community can be a challenge, but you can shift that mindset to embrace positive change.

Anne Schutt has an impressive 24-year career in sales, training and leadership across multiple industries, including healthcare and finance. She is a published author in the bi-monthly magazine, *Construction Beauty*, and has earned a bachelor's degree in marketing and an Executive MBA. She currently holds professional designations as a CERTIFIED FINANCIAL PLANNER™, Wealth Management Professional® and Chartered Financial Consultant®.

“AI AND CYBERSECURITY: NAVIGATING OPPORTUNITIES AND THREATS FOR COMMUNITY BANKS - UNDERSTANDING AI'S ROLE IN STRENGTHENING SECURITY AND SAFEGUARDING OPERATIONS”

Joe Carty, Territory General Manager

Ironcore, Inc., Onalaska, WI

As artificial intelligence (AI) continues to evolve, it presents both transformative opportunities and critical challenges for community banks. This session explores how AI can strengthen cybersecurity through advanced threat detection, anomaly monitoring, and automated incident response while also addressing the risks posed by bad actors using AI for malicious purposes. Attendees learn practical strategies for establishing acceptable AI use guidelines, evaluating vendor AI capabilities, and mitigating the misuse of AI tools. Join us to understand how your community bank can navigate the rapidly changing AI landscape to enhance security, ensure compliance, and safeguard operations.

Joe Carty has been an IT infrastructure and technology applications professional since 1994, and is passionate about applying his information systems and cybersecurity experience to help organizations become more secure. Since joining Ironcore, Inc. as a territory general manager, Carty has focused exclusively on helping community banks meet their technology and cybersecurity strategic initiatives. He is frequently asked to contribute thought-leadership articles on cybersecurity and bank technology related topics.

CLOSING GENERAL SESSION

“CRITICAL INFORMATION FOR COMMUNITY BANK EXECUTIVES”

Greyson Tuck, Attorney & Consultant

Gerrish Smith Tuck, Memphis, TN

The position of community bank executive is one of honor and prestige. It is also one that is not low stress or free of risk. This presentation provides valuable insight into the duties, responsibilities and considerations of a community bank executive in today's environment and presents individual and corporate strategies to ensure success.

Greyson Tuck is president of the law firm Gerrish Smith Tuck, PC and Gerrish Smith Tuck Consultants, LLC, both in Memphis, TN. Tuck's legal and consulting practice places special emphasis on community bank regulatory matters, general corporate law and community bank strategic planning. Tuck is a current faculty member at a number of banking schools across the country, a frequent presenter at state and national bank association conferences and has authored a number of articles of interest to financial institutions. He is a graduate of the University of Tennessee, Knoxville, where he majored in Accounting and Finance. Tuck received his law degree from the University of Memphis Cecil C. Humphreys School of Law, where he was a Herff Scholar.

REGISTRATION FEES

*CBAI MEMBER

First Registration..... \$285
Each Additional Person.....\$265

**PROSPECTIVE-MEMBER

First Registration.....\$485
Each Additional Person.....\$465

**CDD members receive a 10% discount **Only financial institutions/firms eligible for CBAI membership.*

CANCELLATION POLICY

Registrants cancelling two days prior to the conference receive 100% refund; one day prior, 50%; the day of the conference, no refund.

All cancellations must be made in writing prior to the conference day. Invoices and training materials will be sent to all “no shows.”

HOTEL INFORMATION

The “C” Conference will be held at the **Crowne Plaza, 3000 South Dirksen Parkway, Springfield, IL, 62703. Telephone - 217.529.7777**

CONFERENCE MATERIALS

Prior to the seminar, you will be emailed a link containing hand-out materials, seminar certificate, evaluation form and seminar attendee list. Please print and bring materials with you or download them on your own device to access during the program. CBAI will provide power cords in several designated areas to charge devices. **For more information and questions regarding this conference, please contact Tracy McQuinn at 800.736.2224 or via email at tracym@cbai.com.**

FOR MORE INFORMATION

DEPARTMENT OF EDUCATION & SPECIAL EVENTS

Tracy McQuinn, Senior Vice President

Melinda McClelland, Vice President

Jennifer Nika, Vice President

Tina Wilder, Administrative Assistant



Community Bankers Association of Illinois
901 Community Drive, Springfield, IL 62703



www.cbai.com



800.736.2224 or 217.529.2265



217.585.8738

Registration Form

CBAI's "C" Conference - February 19, 2025

Crowne Plaza, 3000 S. Dirksen Pkwy, Springfield, IL

Bank Name _____ Telephone # _____

Address _____

City, State, Zip _____

First Registrant Name/Title _____

First Registrant Email _____

First Registrant Roundtable Selection (Please select one): Wealth Management HR CEO CFO CLO COO

Additional Registrant Name/Title _____

Additional Registrant Email _____

Additional Registrant Roundtable Selection (Please select one): Wealth Management HR CEO CFO CLO COO

Additional Registrant Name/Title _____

Additional Registrant Email _____

Additional Registrant Roundtable Selection (Please select one): Wealth Management HR CEO CFO CLO COO

PRICING: CBAI Member: \$285 for the first registrant/\$265 each additional registrant

CBAI Prospective Member: \$485 for the first registrant/\$265 each additional registrant

Total Amount Enclosed _____

CDD Members receive a 10% discount. Fees include handout materials, refreshment breaks and lunch. An income tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

Registrants cancelling two days prior to the conference receive 100% refund; one day prior, 50%; the day of the conference, no refund.

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***Only financial institutions/firms are eligible for CBAI Membership.**

A conference attendee has special needs; please contact me before the seminar.

Please select your payment method: Check Enclosed Check in Mail Pay at Door Credit Card*

***If you are paying by credit card, please fill out the following information. (Visa, MasterCard & Discover accepted.)**

Name as it Reads on Card _____

Billing Address of Card _____

Card Number _____ Exp. Date _____ Security Code _____