

The "C" Conference

Essential Training for C-Level Community Bankers



February 14, 2024
Crowne Plaza
Springfield, IL



1974

2024

Fifty Years. One Mission. Community Banks.

INTRODUCTION

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

A complimentary Networking Reception is being held February 13th from 6 - 9 p.m. at the Crowne Plaza bar on the second floor of the hotel.

Who Should Attend?

CBAI's "C" Conference is designed for C-level employees. Educational sessions were designed to benefit CEO's, CFO's, COO's and senior lenders.

AGENDA

8 - 8:30 a.m.	Registration/Continental Breakfast
8:30 - 9 a.m.	Welcome & Association Update
9 - 10:15 a.m.	Opening General Session <i>"How Can Your Bank Drive More Profitable Relationships?"</i> Jack Kasel, Sales Development Expert Anthony Cole Training Group, Cincinnati, OH
10:15 - 10:30 a.m.	Break
10:30 - 11:45 a.m.	General Session <i>"Strategies for Managing the Next Phase of the Rate Cycle"</i> Andrea F. Pringle, Financial Strategist The Baker Group, Oklahoma City, OK
11:45 a.m. - 12:45 p.m.	Networking Lunch
12:45 - 1:45 p.m.	Concurrent Education Sessions (Three sessions)
1:45 - 2 p.m.	Break
2 - 3:30 p.m.	Check Fraud Solutions Showcase

OPENING GENERAL SESSION

"How Can Your Bank Drive More Profitable Relationships?"

Jack Kasel, Sales Development Expert

Anthony Cole Training Group, Cincinnati, OH

In most banks, 15% of all consumer relationships drive 75% of deposits and 50% of revenue. Additionally, business relationships with treasury management and the primary operating account has three times the return on capital as a standalone loan. You know the bankers in your group who are skilled at identifying primary relationships and properly leveraging them. What are those lenders and RMs doing differently than others?

Key Learning Objectives:

- Understand what areas and skills are getting in the way of your team's growth and success
- Begin to assess where your team is on these strengths and how to address weaknesses
- Access to a free tool to evaluate your relationship building tool compared to other banks

Jack Kasel has 30+ years of experience in sales and sales management spanning a host of industries including software, transportation, printing services, insurance and training. During his tenure at FedEx, he oversaw all aspects of regional training prior to being promoted to District Manager. Since joining Anthony Cole Training in 2014, Kasel has become one of our community bank specialists, helping our bank clients find and develop relationships, coach and hire better. Kasel brings deep experience of feet on the street, practical selling as well as a coaching and training background, to help banks develop their people and improve their results.

GENERAL SESSION

“Strategies for Managing the Next Phase of the Rate Cycle”

**Andrea F. Pringle, Financial Strategist
The Baker Group, Oklahoma City, OK**

It has been nearly two years since the Fed started the most aggressive tightening campaign in four decades. Interest rate moves this cycle have been both swift and substantial. Banks saw margins expand rapidly in 2022 then shrink in 2023 as balance sheets eventually felt the policy’s impact. What are the Fed’s next moves? Is your balance sheet ready for the next phase of the cycle? This session discusses the current rate environment, banking trends, and balance sheet strategies for today’s environment.

Andrea F. Pringle is a financial strategist and MBS analyst at The Baker Group. She began her career in Washington, DC, where she also earned her MBA from George Washington University. Pringle worked on the capital markets sales and trading desk at Fannie Mae for five years before returning to Oklahoma to work in corporate finance. Pringle joined The Baker Group in 2020 and her work focuses on mortgage products.

NETWORKING LUNCH – 11:45 a.m. – 12:45 p.m.

Take this opportunity to network with other executive level community bankers and discuss the challenges and what’s working within your community bank. This is a great opportunity to idea share with community bankers across the state.

CONCURRENT EDUCATION SESSIONS

“Identifying Bench Strength for Your Bank’s Succession Plan”

**Jack Kasel, Sales Development Expert
Anthony Cole Training Group, Cincinnati, OH**

How do you identify the key producers and leaders to develop and groom who runs your organization of the future? What strengths do they need to take to the next level of performance and what data do current high-performing banks utilize to find and develop their people? During this session, we share how other banks have implemented a leadership framework to identify new leaders and successfully manage critical staffing transitions. Kasel shares what top-performing community bank CEOs are implementing to identify and build their bench strength in order to take their teams to a much higher level of production.

“Curiosity - Building a Culture that Fosters Curiosity”

**Anne Schutt, Vice President of Business Development
Midwestern Securities Trading Company, East Peoria, IL**
Eleanor Roosevelt famously said, “Life must be lived, and curiosity kept alive. One must never, for whatever reason, turn his back on life.” Why is curiosity so important in the workplace? In a Harvard Business Review of 3000 employees, 92% felt that curiosity was a catalyst for job satisfaction, motivation, innovation and high performance, yet only 24% felt curious at work. How do you ensure you are identifying and removing barriers you may have in place that are preventing a curiosity culture so that you can retain and attract talent to your organization.

Anne Schutt serves bank partners as the vice president of business development for Midwestern Securities Trading Company. She 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®.

CONCURRENT EDUCATION SESSIONS (cont'd)

“Management Reporting to Executive Leadership on Digital Transformation Projects”

**Andrew Maychruk, Senior Manager/CIO Advisory Practice
Wipfli, LLP, Chicago, IL**

Effective reporting on Digital Transformation projects is essential for maintaining transparency within the organization. Such reporting should clearly articulate the project's contribution to advancing the bank's digital strategy, thereby positioning it for success in the dynamic market landscape. When presenting these transformation initiatives to executive leadership, the emphasis must be placed on the business impact. This includes outlining the expected tangible outcomes such as customer acquisition, revenue growth, and cost reductions.

The report must present a coherent narrative, incorporating visuals and actionable insights. It is crucial to highlight key milestones, detailing strategies to overcome challenges and mitigate risks. The language and content of the

report should be tailored to resonate with executive leadership. Furthermore, the presenter must be thoroughly prepared to address inquiries, substantiating responses with data and evidence.

In conclusion, the presentation should consistently reinforce the project's role in driving the bank's digital strategy forward, ensuring its readiness to thrive in an evolving market.

Andrew Maychruk is a senior manager with Wipfli's CIO advisory services practice and serves as a technology quarterback and coach for clients in the financial services and nonprofit markets. He works alongside executive and IT leadership to help clients plan, implement and maintain technology solutions to increase the impact of their services by holistically aligning investments in technology/innovation with organizational strategic plans.

CHECK FRAUD SOLUTIONS SHOWCASE

Check fraud is rampant and by the time the fraudulent check is detected by the account holder, the thieves are often long gone. In 2022, banks issued roughly 680,000 reports of check fraud to FinCEN, up from 350,000 in 2021. Meanwhile, the USPS reported 350,000 complaints of mail theft, much of it tied to checks. What can community bankers do to reduce check fraud?

To help stem bank check-related losses, estimated at \$24 billion this year, CBAI's "C" Conference incorporates a showcase of technology companies whose solutions can help community bankers stay ahead of the fraudsters. More detailed information about the showcase vendors will be available shortly.

HOTEL INFORMATION

**CROWNE PLAZA
3000 S. Dirksen Pkwy
Springfield, IL 62703
217.529.7777**

A block of rooms has been reserved for February 13th at the Crowne Plaza. For reservations, call 217.529.7777. Be sure to reference the "Community Bankers Association of Illinois" to receive the room rate of \$109 for a single or double by 02/02/24.

FOR MORE INFORMATION

**Tracy McQuinn, Senior Vice President
Melinda McClelland, Vice President
Jennifer Nika, Vice President
Tina Wilder, Administrative Assistant
Department of Education & Special Events
800.736.2224 217.529.2265
Fax: 217.585.8738**

REGISTRATION FORM

CBAI'S "C" CONFERENCE – FEBRUARY 14, 2024
CROWNE PLAZA, SPRINGFIELD

BANK NAME _____ TELEPHONE # _____

ADDRESS _____

CITY/STATE/ZIP _____

(E-Mail address required for registration)	CBAI Member	*Prospective Member
First Registration/E-mail _____	\$285 <input type="checkbox"/>	\$485 <input type="checkbox"/>
Each Additional Registration/Email _____	\$265 <input type="checkbox"/>	\$465 <input type="checkbox"/>
Each Additional Registration/Email _____	\$265 <input type="checkbox"/>	\$465 <input type="checkbox"/>
Each Additional Registration/Email _____	\$265 <input type="checkbox"/>	\$465 <input type="checkbox"/>
Each Additional Registration/Email _____	\$265 <input type="checkbox"/>	\$465 <input type="checkbox"/>

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 each 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."**

Prior to the seminar, you will be emailed a link containing handout materials, seminar certificate, evaluation form and 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 locations to charge devices. (NOTE: If you have NOT received the link one day before the seminar, please email Tracy McQuinn at tracym@cbai.com)

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

A member of our group has special needs; please contact us before the seminar.

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