

IBANYS CEO Executive Peer Group Meeting

Participate in an *investment* for you and your bank's future!

The 2019 CEO Forum provides a platform to exchange ideas freely, dissect problems, and discuss important issues with peers. The agenda for this session will be flexible — there will be topics that you choose mixed with popular topics from other state CEO forums. *Subject Matter Experts* will occasionally be brought in to cover specific issues and topics that were requested prior to the meeting. This is an opportunity you will not want to miss!

How Do Forums Work?

- All participants are New York State community banks with similar asset size, ensuring commonality between attendees.
- The groups are small—no more than 15 bank CEOs in a group. Spots are reserved on a first-come, first-served basis.
- 6 to 8 topics will be discussed at the session. Topics will be selected from the agenda attached. Participants will review the list of topics and vote on their top choices.
- Participants receive the benefit of working with industry experts on a cost-saving basis.
- A binder containing forum handout materials is provided for each group member.

Benefits of the Forum

- Improve your effectiveness as CEO
- Learn from your peers what's working and what's not in bank financial function
- Improve the efficiency of your bank's financial function
- Form lasting relationships with other CEOs
- Gain insight into your most pressing accounting and finance concerns
- Obtain access to highly respected industry experts
- Grow professionally as well as personally

CEO Forum Agenda

Attached is a tentative CEO Forum agenda with categories and subjects of discussion. Topics of discussion will be determined by those that register and vote for their top choices. Topics with the highest number of votes will be the subjects of discussion at the forum. View the potential topics and select your choices on the corresponding registration form.

Meet Your Facilitator

Karl Nelson

Founder & CEO, KPN Consulting

KPN Consulting is a consulting and training firm that assists community banks with strategies to improve profitability, risk control, and business development. Karl serves on the faculties of the Graduate School of Banking in Madison, Wisconsin and Boulder, Colorado, the Graduate School of Bank Investments & Financial Management in Columbia, South Carolina, as well as the faculties of the state banking schools in Florida and Tennessee.



Location: Oak Hill Country Club

145 Killbourn Road
Rochester, NY 14618

Date: April 2, 2019

Time: 9:00am to 4:00pm

**Breakfast & coffee will be served at 8:30am*

Registration Fee: \$395.00

CANCELLATION POLICY: Any registrant who does not cancel at least 30 days before the session will be billed the full registration fee and sent the materials.

QUESTIONS/MORE INFORMATION

Linda Gregware

Director of Administration & Membership Services
lindag@ibanys.net | www.ibanys.net
Phone: (518) 436-4646 | Fax: (518) 436-4648
19 Dove St. | Suite 101 | Albany, NY 12210



CEO Forum Registration Form



Complete the form below and mail, fax, or email to:

Linda Gregware

Email: lindag@ibanys.net
Mail: IBANYS, 19 Dove St, Suite 101, Albany, NY 12210
Fax: (518) 436-4648

*If you have any questions, please contact Linda Gregware by email or phone (518) 436-4646.

Registration Deadline: March 12, 2019

**Spots are reserved on a first-come, first-served basis*

Date: April 2, 2019

Time: 9:00am to 4:00pm

Location: Oak Hill Country Club
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Forum Topics

Below is a list of categories and subjects of discussion for the CEO Forum. Please mark your **top 5 choices** by filling in the circle next to the subject you would like to discuss. Topics with the highest number of votes will be the topics of discussion at the forum.

Regulatory Update

- Recent Exam Experience
- Recent Regulator Issues
- CECL Update

Industry Update

- National & New York Profile
- State Competitive Issues
- Credit Union Update

Distribution Channels

- Branch Design & Strategy
- ATM & ITM Updates
- Digital Banking Strategy

Staffing Issues

- Succession Planning
- Hiring/Retaining Top Talent
- Incentive Concepts That Work

Board Issues

- Strategic Planning Update
- Compensation & Marketing Concepts
- Succession Planning

Growth Strategies for 2019-20

- New Lending Concepts
- Deposit/Funding Strategies
- Services Updates

Technology Fintech

- Partnerships
- Competition
- Enhancing Process

1. _____ 2. _____ 3. _____
 4. _____ 5. _____

Bank/Organization: _____

Address: _____

City/State/Zip: _____

Phone: _____ Fax: _____

Attendee Name: _____ Title: _____

Email: _____

Payment

My check (made payable to IBANYS) is enclosed

Price: \$395.00

Charge

Visa/Mastercard/AMEX number: _____

Cardholder Name: _____

Expiration Date: _____

Billing address (if different from above): _____

CVV (3 digits back of card/AMEX 4 digits on front of card): _____