



Executive Management Conference

September 17-19, 2014

The Grand Hotel - Point Clear, Alabama

Wednesday, September 17, 2014

3:00pm Registration Begins, *Grand Ballroom Foyer*

6:00pm-8:00pm Opening Reception, *Grand Ballroom Patio*
Sponsored by Louisiana Bankers Service Corporation

Thursday, September 18, 2014

7:30am-8:00am Breakfast - *Salons C-F*

8:00am-9:15am **A Payments Approach to Checking Revenue - *Salons A-B***
Bob Giltner, R.C. Giltner Services, Inc.

Revenues are up for transaction account services, just not at banks where retail service charge revenue is down nearly 20% between 2009 and 2013 according to FDIC data. At the same time, payments companies like PayPal grew revenues over 20% every year during the same time period. This session will show banks how they can grow their service charge revenue by 30% with fees consumers willingly pay by taking a "payments" approach to checking revenue.

9:30am-10:45am **Leading from the Front: Leadership & Strategic Execution - *Salon A-B***
Jim Burson, Cornerstone Advisors

During this session, we will discuss such questions as: (1) How well do we really understand the effectiveness of the interactions and relationships between the CEO and their direct reports, between the CEO's directs and their teams, and the resulting impact on strategic execution, operating efficiency and customer satisfaction? (2) How committed are we to recognizing our leadership blind spots and what are we doing to address them? (3) How important are organizational alignment and reporting relationships to strategic execution and the types of improvements that can be made to the bank's organizational processes, i.e., planning, project management, communications and talent development in order to achieve the bank's goals, strategy and vision? (4) Do senior leaders possess and demonstrate the strategic skills and competencies required for their current position? If not, can be done to address the situation? If so, do these leaders have career development plans in place that support their personal and professional growth objectives? (5) What is the importance of leadership in ensuring the bank avoids the "strategy is broken" conundrum?

10:30am-1:00pm **Guest Program: *Cooking Class & Lunch*** - See Page 4 for more information

11:00am-12:00pm **Creating Loan Demand in Tight Pricing Competition - *Salon A-B***
Duane Sobecki, Focused Results

Demand for lending is out there in the residential, commercial, and consumer lending segments if you know where to look. This engaging session looks at ways community banks can find these opportunities, and find them faster than your competitors can, especially in this tightly priced environment. The first priority will be how to generate more opportunities and loans from your existing customers. The second priority is to take opportunities away from your competitors. The program focuses on tactics that will help you discover, qualify, and take all available loan opportunities. This informative and entertaining session examines the concepts of identifying opportunities, prequalifying which customers and prospects make sense to work with, and which areas of loan opportunities you might examine for specialization.

12:00pm Sessions Adjourn

1:00pm-5:00pm **Golf Scramble** - See Page 4 for more information
**Box lunches will be provided prior to start, beginning at 12pm in the Lakewood Club House.*

1:00pm-5:00pm **Charter Fishing Trips** - See Page 3 for more information
**Box lunches will be provided prior to start, beginning at 12pm at the Marina at the Grand Hotel.*

Evening on Your Own



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Friday, September 19, 2014

- 7:30am-8:30am Breakfast featuring Sponsor Spotlight - *Salons C-F*
- 8:30am-9:00am Office of Financial Institutions Update - *Salons C-F*
- 9:00am-10:15am **Multi-Bank Holding Company Panel Discussion - *Salon A-B***
Moderator - Jeff Fair, American Planning Corporation
Merger activity is heating up, and some acquirers are considering creative deal structures to minimize customer disruption or take advantage of unique market opportunities. In this session, we will hear from several bankers who have experience leading multibank holding companies and learn the pros and cons of operating separate banking charters under one corporate umbrella.
- 10:30am-12:00pm **Integrating Technology Into Your Enterprise Strategy - *Salon A-B***
Trent Fleming, Trent Fleming Consulting
Historically, banks have had two strategic plans: an enterprise, or business plan, and a separate technology plan. This is no longer tenable, as technology now becomes the driving force behind most strategic initiatives. This session discusses methods of integrating technology planning into your enterprise planning efforts, providing insight to senior managers and executives as to the increasingly visible and important role technology plays in the banking environment. Topics include selected new technologies, negotiating and managing vendor relationships, merger and acquisition planning, managing operations and technology staff, and engaging with customers to maintain strong relationships via electronic channels.
- 12:00pm **Conference Adjourns**

Conference Speakers



Bob Giltner serves as CEO of R.C. Giltner Services, Inc., which brings consulting, software and web services to financial institutions to win checking and small dollar loan relationships and grow service charge revenue consumers willingly pay. He specifically has extensive experience in compliance and regulatory management. Bob Giltner brings nearly 30 years of experience in the financial services industry. Bob has taught at the Sheshunoff CEO Affiliation Program, the Prochnow Graduate School of Banking, and has been a frequent speaker for the ABA, BMA, BAI and at many other conferences. He has published numerous articles in BAI Banking Strategies, Commercial Lending Review, Bank Cost Accounting, Bank Accounting and Finance, and Bank Compliance Management. He co-authored the American Banker Association publication, Overdraft Protection: A Guide for Bankers, and provided testimony for the U.S. House Committee on Financial Services.



Jim Burson brings a deep knowledge of the financial services industry as well as a wide range of executive management and business planning experience to his position as Senior Director of Cornerstone Advisors' Strategic Planning practice. Before joining the Cornerstone team, Jim served as the Executive Vice President and Chief Revenue (Operating) Officer of a large regional bank in the Southeast, affording him extensive insight into the world of retail and commercial banking management and operations. Earlier in his career, Jim served as Principal and Co-leader of the banking practice at a Chicago-based management and technology consulting firm. Jim also held positions of progressive responsibility in retail bank strategic planning, marketing and affinity development and sales management at PNC Bank Corporation. Prior to PNC, Jim helped lead a consulting firm focused on channel strategy, sales management and customer analytics. He started his career as a commercial banker in Chicago. Jim holds a Master of Management degree from the J.L. Kellogg Graduate School of Management at Northwestern University.



Duane Sobecki is CEO of Focused Results, LLC, a sales and marketing strategy, consulting, and training firm. A renowned authority in sales strategy and strategic market segmentation, Mr. Sobecki provides assertive strategies to drive loan demand, business development, product and service lines to community banks and other FI's. Mr. Sobecki specializes in helping the financial services industry better segment important markets, and direct sales and marketing strategies at those key segments to ensure revenue and profit growth. Mr. Sobecki is the principal writer of Market Data Monday, a weekly look at how banks can take advantage of the improving economy, and the author of numerous reports and booklets on key market segment development and improvement. Mr. Sobecki holds BS from the Kelley School of Business at Indiana University and has a certificate in management planning from the University of Illinois - Chicago.



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Conference Speakers (Continued)



Jeff Fair joined American Planning in 1993 and currently serves as the senior consultant for the company's financial institution clients. In addition to his regular financial consulting work with over 40 community banks, Mr. Fair has assisted in the formation of 26 new community banks, prepared over 50 banks for S-Corporation elections, completed over 450 valuation engagements and participated in a wide range of bank mergers and acquisitions. Mr. Fair holds a Bachelor of Business Administration from Baylor University, a Masters of Finance from Louisiana State University, and the Certified Valuation Analyst designation from the National Association of Certified Valuation Analysts.



Trent Fleming - A thirty year industry veteran, Trent is widely recognized as an expert in many areas of banking technology, operations, and strategy. Over the years, he has helped hundreds of banks make wise decisions about the optimum use of their management and technology resources. As a consultant, Fleming was a pioneer in the introduction of check imaging technology to the community bank market, working with hundreds of banks in the selection, implementation, and management of image P.O.D, archive, and statement systems. More recently, he has replicated that success with other emerging technologies, including Internet Banking, Remote Deposit Capture, and Mobile Banking. His ability to assist banks in training employees and educating customers about the benefits of products and services results in a positive experience as emerging technologies are introduced. He has consulted with banks on matters as diverse as strategic planning, business continuity, and operational efficiency.

Location & Hotel Information

The Grand Hotel, Point Clear, Alabama
One Grand Boulevard
Point Clear, Alabama 36564
(251) 928-9201



About The Grand Hotel

For more than 165 years, the Grand Hotel Marriott Resort, Golf Club & Spa has served guests with true Southern hospitality. With a great tradition steeped in both society and the military, this luxury Alabama hotel overlooking Mobile Bay, was originally built in 1847 and had just 40 rooms on two floors. Over time it has served as a military hospital as well as an Air Force training facility. Each afternoon the staff pays homage to the hotel's past with a military procession and cannon firing. Today, the classic grandeur remains while modern updates and conveniences will ensure guests will be comfortable during their stays. No matter how time is spent at the Grand Hotel, you will find peace and seclusion on 600 private acres in Point Clear. The Grand Hotel has been awarded the Top 121 Golf Resorts by Conde Nast Traveler, the Top 500 Hotels in the World by Travel & Leisure, and the Top 50 Golf Courses for Women by Golf Digest.

Hotel Reservations at The Grand Hotel

The LBA has contracted for a set number of sleeping rooms at The Grand Hotel based on the last few years' attendance. We will monitor the room pickup and add rooms if available. We encourage you to make your reservations early to receive the LBA's discounted rate of **\$189.00+ tax**. The deadline for the room block is **September 1, 2014**. After that date, reservations will be made based on availability and the hotel may not be able to honor the discounted rate.

Reservations: Call (800) 544-9933 (mention Louisiana Bankers Association group room block)

OR

[Click Here](#) to book online.



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Conference Activities

Guest Program: Cooking Class & Lunch

Thursday, September 18, 2014

10:30am-1:00pm

\$75 per person

A Grand Hotel Chef will conduct a fun and educational cooking class. When that's done, you will actually get to eat the finished product. You will receive an educational cooking class, lunch, recipes, a Grand Hotel Cooking Academy Diploma - not to mention a great time!



Golf Scramble at Lakewood Golf Club

Azalea Course

Thursday, September 18, 2014

1:00pm

*\$135 per person**

**Cost includes box lunch.*

The Lakewood Golf Club at the Grand Hotel is a sparkling resort member of the Robert Trent Jones Golf Trail. Rolling fairways, tight greens, spring-fed lakes, meandering streams, and strands of mature trees make for both a beautiful and challenging experience.

**Box lunches will be provided prior to the start, beginning at 12pm in the Lakewood Club House.*



Charter Fishing Trips - Inshore Saltwater Fishing

Thursday, September 18, 2014

1:00pm- 5:00pm

*\$150 per person**

**Cost includes box lunch and beverages on the boat.*

**Limited seats available. Please register early.*

Join experienced and licensed guides that will take you fishing for speckled trout, redfish, flounder, and more within minutes of leaving the dock. Tackle, bait, license, and instruction are included. Come prepared to have fun!

**Box lunches will be provided prior to the start, beginning at 12pm at the Marina at The Grand Hotel.*





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Registration Information: (for multiple registrations, please make copies of this form)

Name _____
 Bank _____
 Address _____
 City / State/ Zip _____
 Email Address _____
 Phone _____ Cell Phone _____ Fax _____

Conference Fees:

- Banker Program: *\$350 LBA member, \$650 non-member* \$ _____
 - Spouse/Guest: *\$100* - Name: _____ \$ _____
 - Golf Scramble: Thursday, September 18 - *\$135 per person*
 - Name: _____ \$ _____
 - Pairing Request: _____
 - Name: _____ \$ _____
 - Pairing Request: _____
 - Guest Program: Cooking Class & Lunch - Thursday, September 18 - *\$75 per person* \$ _____
 - Name: _____
 - Charter Fishing Trip - Thursday, September 18 - *\$150 per person* \$ _____
 - Name: _____ Name: _____
 - Name: _____ Name: _____
 - Name: _____ Name: _____
- Total \$ _____

Payment Options:

- Check (Made payable to the Louisiana Bankers Association)
- Visa MasterCard American Express

Card Number _____ Amount to be charged on card _____
 Expiration Date _____ Name on Card (please print) _____
 Billing Address _____
 Signature _____

Cancellation Policy:

Due to the commitments we must make, if you must cancel your conference registration, please do so by September 10, 2014 to avoid a \$150 cancellation fee. Substitutions are welcome at no additional charge.

Guest Program: Cooking Class & Lunch - Please cancel by September 10, 2014 to avoid a \$35 cancellation fee.

Golf - Please cancel by September 10, 2014 to avoid a \$65 cancellation fee.

Fishing - Please cancel by September 10, 2014 to avoid a \$65 cancellation fee.

**Any registrant who does not cancel any of the above mentioned events will be billed the full fee.*

Submit registration and view rosters in the Education Section of LBA's website,
<http://new.lba.org/content.cfm?id=91>

Louisiana Bankers Association
 5555 Bankers Avenue
 Baton Rouge, LA 70808
 225-387-3282 (Phone)
 225-343-3159 (Fax)
holmes@lba.org