



Executive Management Conference

September 18-20, 2019

The Grand Hotel - Point Clear, Alabama

Wednesday September 18, 2019

Business/Resort Casual Dress

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

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

Thursday September 19, 2019

Business/Resort Casual Dress

7:30am-8:30am **Breakfast featuring Sponsor Spotlight - Grand Ballroom South**

8:30am-9:30am **Changing Landscape of Liquidity - Grand Ballroom North**
Jim Reber, ICBA Securities

Liquidity is a key concern among financial institutions and regulators. Loan growth is outpacing deposit growth while non-core funding is becoming a larger percentage of total assets. Competition for deposits is fierce as the largest banks search for high-quality, LCR-compliant retail deposits and the increase in short-term rates has spurred growth at the online banks offering more attractive yields. During this session, we will discuss “best practices” for liquidity risk management, regulatory expectations, and contingency funding strategies to help community banks supplement core deposit growth.

9:45am-10:45am **The New Frontier: Digital Customer Engagement - Grand Ballroom North**
Brett Dooies, nCino

Perhaps you’ve noticed: There is a driving theme across the financial services industry to innovate and improve the customer experience when interacting with a financial institution. Research shows customer expectations for this experience are drastically changing. As foot traffic to branches decreases year over year, you need to evaluate your financial institutions strategic plans to ensure you’re not left behind. This session will discuss industry trends in digital customer engagement and provide you with the tools to begin taking steps to create a delightful customer experience.

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

11:00am-12:00pm **“Today’s Louisiana Community Bank” Panel Discussion - Grand Ballroom North**
Moderator: Gary Littlefield, Gulf Coast Bank & Trust

Panelists:

- Desiree Simmons, First Guaranty Bank
- Jeremy Callais, MC Bank & Trust
- Paige Oliver, Bank of Oak Ridge
- Brian Thorguson, Patterson State Bank

In this session, we will talk about what banks are doing to grow and prosper. Join in a conversation with your peers to learn how they are growing and prospering. From taking advantage of technology to bringing on young board members, management and staff, this discussion will help us all.

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.*

Evening on Your Own



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Friday September 20, 2019

Dress in your favorite sports team shirt or Business/Resort Casual Dress

7:30am-8:30am **Breakfast with Sponsor Spotlight and Office of Financial Institutions Update - John Ducrest, Commissioner - *Grand Ballroom South***

8:30am-9:30am **Surviving an Incident of Violence - *Grand Ballroom North***
Terry Choate & Joe Hileman, Blue-U Defense

Successfully surviving a sudden incident of violence is 90% mental and 10% physical skill. This session focuses on the 90% mental while concurrently providing skills to survive the 10% physical, as a last resort. Session topics include:

- The “Life or Death Gap” - What you do during this gap of time that starts the moment you understand that there is danger to you and/or someone you love and care about is critical.
- You, and only you, are responsible for your safety and security. You cannot rely on others to be there when reality strikes.
- Securing and Hardening our physical sites. We know that we can’t stop acts of violence from happening in their entirety but we can do things to make us less attractive as a target.
- If you “see something” you must “say something”. However, if we aren’t paying attention and don’t see it, we can’t say it. Be ultra vigilant and ultra aware at all times.
- Policy & Procedure Vs. Plan - There is a significant difference. Although we can’t give our employees a specific plan for every incident, we must give them tools to help them create their own plan depending on the incident.
- If the first time you think about an incident of violence is when you are involved in the incident, you are likely to make critical errors that may cost you or a loved one their life.
- Tunnel Vision: The quicker you can get outside the attackers “attack tunnel” the greater your chance of survival!
- Tactics: Remember the attackers attack tunnel should influence all our tactics!
- Your First Option should always be to get out and/or away from the attacker
- Remember your Hard Corners & Weapons of Opportunity and/or Plan

9:45am-10:45am **Creating Cultures that Engage and Retain Millennials and Generation Z - *Grand Ballroom North***
Tyler Winner, Dale Carnegie Training

Their work habits are different. Their values are different. They care about work life balance and being part of an organization with values and principles that are important to them. And they will soon make up a majority of the workforce - they are the Millennial generation. But there is more to this than meets the eye and we could be missing opportunities by stereotyping this generation, as well as the next. Indeed, there are as many similarities across generations as there are differences. Dale Carnegie conducted a study to uncover what drives engagement among millennials and to identify what is similar and dissimilar about this generation and generation Z so that leaders can better develop an environment that engages and retains the new generations of today’s workforce. Join us for this interactive session as we present our research and practical applications for engaging your younger employees.

11:00am-12:00pm **Hot Federal Topics (Private Flood Insurance, Cannabis Banking, CRA Modernization) - *Grand Ballroom North***
Rick Freer, American Bankers Association

Is it time to take your foot off the gas, or keep the “pedal to the metal”, or somewhere in between? We will have a high-level discussion of current issues related to Cannabis banking, private flood insurance, CRA modernization, HMDA data going forward, fair lending hot button issues, and others. The ride may be slower than in previous years, but some pot holes still remain.”

12:00pm **Conference Adjourns**



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Conference Speakers

Jim Reber is President and CEO of ICBA Securities. He has over 30 years of financial services experience, and is a frequent speaker and lecturer at bank investment seminars and workshops. Jim also writes a monthly investment column for *Independent Banker* magazine. He is a member of the Board of Regents at Barret School of Banking in Memphis, TN, and served a term as Chairman. Jim is a Certified Public Accountant and a Chartered Financial Analyst, and is a graduate of Christian Brothers University, where he serves on the Board of Trustees as Chairman of the Finance Committee and University Treasurer.

Brett Dooies is currently a manager on the retail product team at nCino. In this role he has the privilege of working with customers and stakeholders across many of the nCino solutions including Retail Banking, Customer Engagement, Small Business Lending, Deposit Account Opening, and Enterprise Onboarding. Prior to joining the retail team, Brett worked on all parts of the product and enjoyed building out exciting features like Document Manager, Syndications and Participations, and Equipment Leasing and Finance. His favorite part of the job is engaging with customers and partners to solve difficult problems with creative solutions. When not collaborating with his nCino colleagues, Brett enjoys spending time with friends and family, playing tennis, reading, and sailing.

Terry Choate is a Co-Founder and CEO of Blue-U Defense. He has amassed extremely high levels of training and experience in law enforcement-related areas of expertise over his 15 years as a full-time law enforcement officer and SWAT Team Commander including Drug Enforcement; Predictive Profiling; Danger Human Behavior; Defensive Tactics; Stalking; Tactical Operations; Incident Command; Certified Homeland Protection Professional and on-and-on. He also has amassed significant training levels in the area of high-level corporate security to include CARVER Security Assessment Theory; Corporate and Executive Protection; Surveillance; Counter Surveillance; Anti-Terrorism; Security Advances, Intelligence Operations; and on-and-on. While he emphasizes that this is all extremely impressive, and most think that it's the profession of law enforcement, military, and security, and the training and experiences inherent in these professions, that gives qualification for instruction in how to stay safe, this is far from reality. His interest in the topic of understanding criminal activity and keeping people safe started when he was 13 years old and has been his life's passion ever since. Through his 20 years serving in high-level management positions within the corporate-world, prior to becoming a law enforcement professional, and continuing through his 15 years in law enforcement, understanding criminal activity, how people become criminals, how they choose victims, and what and how we can keep ourselves safe in today's world of dangerous and unique threats has truly been his life's passion. He is a "thought-leader on the topic of "true and real safety and security".

Joe Hileman is a Co-Founder and Training Specialist for Blue-U Defense. He served as the Assistant Team Commander of the Monadnock Regional Special Response (SWAT) Team and for 15 years as a Detective /Police Officer with the Jaffrey (NH) Police Department. Prior to his career in Law Enforcement, he served as Security Supervisor at the corporate management level of a Fortune 500 company. Mr. Hileman holds two A.A. degrees in Criminal Justice – Law Enforcement and Criminal Justice – Corrections, Probation, and Parole. His extensive tactical training includes: SWAT 1 and 2 Certification, Tactical Officers and LEADS Consulting; SWAT Team Leader/Commander; Use of Force, Active Shooter Instructor; Narcotics – Covert Surveillance; OC Instructor; Domestic Violence Lethality Assessment Coordinator; Field Training Officer; Sexual Assault Investigator Specializing in the Child Forensic Interview; Suspicious Death/Homicide Investigations.

Tyler Winner is President of The Winner Institute, representing Dale Carnegie Training® in middle Louisiana and east Texas. For over 26 years he has helped executives and leaders focus their visions and build their organizations. His organization is comprised of over 12 associates and trainers in 3 locations throughout Louisiana and Texas. In the past 3 years, The Winner Institute has trained over 2000 employees in over 200 companies throughout the region. Recent customers include: Exxon-Mobil, Petroleum Helicopters, Conn's, Gerry Lane Enterprises and Georgia Pacific. Globally, Dale Carnegie Training collaborates with Microsoft, General Motors, Boeing and Home Depot to name a few - to accelerate the growth and success of its key employees.

Rick Freer joined the ABA in December 2011 after a career at the OCC, with the last 20 years focused on consumer compliance policy and examinations. Rick works on fair lending, UDAAP, flood, HMDA, and CRA issues. He is on the ABA's Compliance Schools Advisory Board, instructs at ABA school offerings, speaks at national and state banking conferences, and writes articles for the ABA's Bank Compliance Magazine.



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Location & Hotel Information

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



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 ensure the LBA group rate (see tiered rates below), please call (800) 544-9933 and identify that you're booking with the Louisiana Bankers Association Executive Management Conference room block. Reservations can also be made online by [clicking here](#). The deadline to receive the group rates is August 30, 2019. After that date, reservations will be made based on availability, and the hotel may not be able to honor the discounted rate.

****For reservations pre and post conference dates (Tuesday 9/17, Friday 9/20 and Saturday 9/21), it is recommended that you call the hotel at (800) 544-9933 for reservations to ensure the group rate.***

Group Room Rates:

Deluxe Resort View Room - \$219+tax/night

Spa Building Resort View Room - \$239+tax/night
(optional upgrade, based on availability. Please call (800) 544-9933 for reservations)

Deluxe Bay View Room - \$269+tax/night
(optional upgrade, based on availability. Please call (800) 544-9933 for reservations)

Spa Building Bay View Room - \$279+tax/night
(optional upgrade, based on availability. Please call (800) 544-9933 for reservations)

Conference Activities

Guest Program: Cooking Class & Lunch
Thursday, September 19, 2019
10:30am-1:00pm
\$75 per person



**Please note: This has been cancelled due to low registration. Please contact the LBA office if you have any questions.*

Golf Scramble at Lakewood Golf Club
Thursday, September 19, 2019
1:00pm-5:00pm
\$135 per person (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 stands 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. Club rentals are on your own. If you need to rent clubs, please call the Lakewood Golf Pro shop at 251-990-6312.

Additional Activities Information

Charter Fishing - Want to fish while you are in Point Clear? Set up a charter fishing trip by contacting Right Lane Charters at the Grand Hotel. [Click here for more information.](#)

Grand Hotel Culinary & Beverage Academy - The Grand Hotel will be offering these classes Friday and Saturday. Click on the link for more information and to register:

- [Beverage Academy - Irish Whiskey Class - Friday, 9/20, 5:30pm](#)
- [Culinary Academy - Cooking Essentials: Cake Decorating - Saturday 9/21, 10am](#)

Conference Sponsors



Insurance | Risk Management | Consulting





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

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

Conference Fees:

Banker/Non-Banker Program: **\$375 LBA member, \$675 non-member** \$ _____
 Spouse/Guest: **\$125** - Name: _____ \$ _____
 Golf Scramble: Thursday, September 15 - **\$135 per person**
 Name: _____ \$ _____
 Pairing Request: _____
 Name: _____ \$ _____
 Pairing Request: _____

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 11, 2019 to avoid a \$175 cancellation fee. Substitutions are welcome at no additional charge.

Guest Program: Cooking Class & Lunch - Please cancel by September 11, 2019 to avoid a \$35 cancellation fee.

Golf - Please cancel by September 11, 2019 to avoid a \$65 cancellation fee.

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

Conference Attire

Dress for all conference events is business/resort casual. On Friday 9/20, wear your favorite sports team shirt.

Submit registration and view rosters in the Education Section of LBA's website, <http://www.lba.org>

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