



EXECUTIVE MANAGEMENT CONFERENCE

September 22-24, 2021 • Point Clear, AL

Join us for the annual LBA Executive Management Conference at the historic Grand Hotel Golf Resort & Spa in Point Clear, Alabama. The conference will feature presentations on current issues in banking as well as the opportunity to network with fellow bankers and sponsors.

Location

The Grand Hotel Golf Resort & Spa
One Grand Boulevard
Point Clear, Alabama 36564

Registration Fees

- **Banker/Non-Banker Program:**
\$390 members/\$690 non-members
- **Spouse/Guest Fee:** \$125
- **Golf Scramble:** \$135
- ***NEW!* Virtual Option - Live Stream Via Zoom:**
\$390 members/\$690 non-members

Who Should Attend

Presidents/CEOs, Directors, CFOs, COOs, Senior Lenders

Hotel Information at The Grand Hotel

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. [Click here to book online.](#)

The deadline to receive the group rates is **August 31, 2021**. After that date, reservations will be made based on availability and the hotel may not be able to honor the discounted rates. **For reservations pre and post conference dates (Tuesday 9/21 and Friday 9/24), it is recommended that you call (800) 544-9933 for reservations to ensure the group rate.*



Group Room Rates:

- **Deluxe Resort View Room** - \$225+tax/night
- **Deluxe Bay View Room** - \$275+tax/night (optional upgrade, based on availability. Please call for reservations)
- **Spa Building Resort View Room** - \$245+tax/night (optional upgrade, based on availability. Please call for reservations)

COVID Update (as of September 7, 2021)

We continue to monitor COVID-related restrictions daily, and, will offer conference education sessions virtually in addition to in-person. The hybrid offering will allow those more comfortable attending virtually to do so. For the in-person conference, we have a large amount of meeting space confirmed for the breakfast and education sessions on Thursday 9/23 and Friday 9/24. We will be able to social distance seats in the meeting room. We will have an abbreviated opening reception on Wednesday 9/22 from 6pm-7pm at Julep Point, a partially covered outdoor area on the grounds of The Grand Hotel. Currently, there are no restrictions in Alabama.



Executive Management Conference

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WEDNESDAY SEPTEMBER 22, 2021

Business/Resort Casual Dress

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

6:00pm-7:00pm **Opening Reception, *Julep Point***
Sponsored by Louisiana Bankers Service Corporation

THURSDAY SEPTEMBER 23, 2021

Business/Resort Casual Dress

7:45am-8:30am **Breakfast featuring Sponsor Spotlight - *Grand Ballroom***

8:30am-9:30am **Beyond the Image of Diversity: How to Create a Culture of Inclusion -
Dima Ghawi - *Grand Ballroom***

While it is reassuring that more organizations recognize the value of diversity in their teams and are implementing metrics to measure progress, the real goal of diversity is to create a culture of inclusion and belonging. By focusing on establishing an inclusive environment, organizations can unlock the true value of diversity. In this presentation, Dima Ghawi shares three tips based on workplace surveys and interviews that she has conducted across a variety of organizations. They include:

- Providing insight into what employees need to feel welcomed and included.
- Managing change and creating a courageous culture, instrumental for handling conscious and unconscious biases, micro-aggressions, and resistance to inclusion initiatives.
- Structuring and utilizing Employee Resource Groups (ERGs), valuable affinity groups that provide a support network and education opportunity for their members and also increase awareness across the company.

Creating a culture of inclusion is no longer simply “a nice to have.” Instead, it is essential for recruiting, engaging, and retaining top talent, and, as a result, increasing the competitive advantage of the company. Audience members leave with actionable takeaways that can be employed to create a productive, engaging, and inclusive workplace for their team.

9:45am-10:45am **Upside Down Thinking on Efficiency: Change Your Priorities to Change
Your Results - Dr. Sean Payant, Haberfield - *Grand Ballroom***

Financial institution executives spend considerable time thinking about strategies to improve efficiency in order to improve overall profitability. Often, this includes a focus on expense reductions. Once a financial institution can no longer materially improve its efficiency ratio by further reducing costs, what's next? Maybe it's time to take a step back and realize some fundamental business dynamics that are often ignored in our industry - strategies to increase overall income without exponentially increasing expenses. Key points to be covered in this session:

- Explore specific strategies to improve your institution's ROA and ROE
- Understand methods to significantly increase core customer acquisition
- Utilize data to understand the impact of customers on overall profitability

11:00am-12:00pm **Internal Control - Integrated Framework - Jaclyn Broussard and Ryan
Kelley, LaPorte CPAs and Business Advisors - *Grand Ballroom***

It is imperative that an organization has an effective internal control environment to detect and prevent fraudulent activity. In addition, some banks require an annual audit of their internal controls so there is a compliance component as well. This presentation covers the five components of an effective internal control environment, risk assessment considerations and procedures to be performed to verify the control environment is operating effectively.

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 24, 2021

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

7:45am-8:30am **Breakfast with Sponsor Spotlight and Office of Financial Institutions Update by Stan Dameron, Commissioner - Grand Ballroom**

8:30am-9:30am **U.S. and Louisiana Economic Overview With an Eye on Insured Institutions - Alan Bush, FDIC - Grand Ballroom**

Alan Bush from the FDIC's Division of Insurance and Research will provide an economic overview of the U.S. and the State of Louisiana. Economic volatility has been escalated with the pandemic and weather events, and key economic drivers for Louisiana like oil and gas, trade, and tourism have each been under pressure. We will consider these issues and see how banks have performed during the past year.

9:45am-10:45am **How to Create Better Connections in a Disconnected World - Joe Micallef, Grow Up Sales - Grand Ballroom**

During the pandemic we all discovered how to connect while being physically disconnected from each other. This discovery made it easy to still do business, and as our branches and the economy reopens it is unlikely our customers and prospects will want to return to only meeting in-person. So how do bankers build deeper relationships with their customers when they can't meet in-person? The answer is to confidently embrace all the different ways you can still meet and proactively rethink the way you add value. During this session, Joe Micallef will outline:

- Why it is critical now to position yourself as the only finance provider your customer will need
- Compelling reasons that will motivate your customers and prospects to meet with you
- Five effective ways to meet with your customers and make a great impression

11:00am-12:00pm **2020 Election Summary, 2022 Election Preview and Current Legislative Environment - Eric Haar, Federal Home Loan Bank of Dallas - Grand Ballroom**

This session will break down the 2020 House, Senate and presidential election outcomes as well as provide a preview of the 2022 elections. Finally, Mr. Haar will summarize current legislative and regulatory developments impacting community lenders.

CONFERENCE SPEAKERS



Dima Ghawi is the founder of a global talent development company with a primary mission for advancing individuals in leadership. Through keynote speeches, workshops, training programs, and executive coaching, Dima has empowered thousands of professionals across the globe to develop critical business skills and expand their leadership potential. In addition, she has provided guidance to business executives to help them understand the value of gender diverse leadership, and to develop a multi-year plan for advancing quality leaders from within the organization. Dima draws from two decades of corporate experience leading global teams and developing future leaders worldwide. She has worked across the United States, Europe, Asia, Middle East, and Africa for several Fortune 100 companies including IBM, Merrill Lynch, and Intuit. Through her work, she has honed a keen expertise in developing leaders to meet the demands of the global workforce. For more information, visit DimaGhawi.com and BreakingVases.com.



Dr. Sean Payant, Chief Strategy Officer, served as the Executive Director of the Schools of Banking for nine years prior to joining Haberfeld in 2007. He has administered, instructed, and authored materials for 17 different banking schools attended by bankers from 18 states. He has published articles on bank marketing, bank profitability, employee engagement, goal setting and community bank differentiation. Sean has presented more than 125 keynote and breakout sessions at industry events. In addition, he has facilitated numerous strategic planning sessions for community financial institutions. He holds Masters and Doctor of Philosophy degrees from the University of Nebraska.



Jaclyn Broussard, CPA, MBA is Director, Audit and Assurance Services at LaPorte CPAs & Business Advisors. Jaclyn has extensive knowledge in reporting under Section 404 of the Sarbanes-Oxley. Jaclyn has performed operations reviews over various cycles of the financial reporting process and assisted clients with incorporating best practices and internal controls into their processes and procedures. She is a leader in our Risk Advisory Group. A co-leader of the Financial Services Industry Group, Jaclyn manages and is involved in all aspects of assurance engagements, from planning to review, for investment funds, broker-dealers, SEC-registered entities, and community-based financial institutions. In addition, she has performed internal audits, SOX compliance, loan exams, and operations reviews. Jaclyn has extensive experience in PCAOB compliance as well.



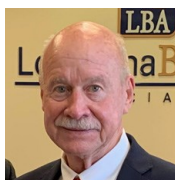
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CONFERENCE SPEAKERS *(continued)*



Ryan Kelley, CPA is Director, Audit and Assurance Services at LaPorte CPAs & Business Advisors. Ryan began his career at a Big Four firm in 2003, serving clients in a wide range of industries. He has experience evaluating internal controls and performing audits, reviews, and agreed upon procedures for SEC registrants and other entities. Ryan's audit experience includes SEC filings, private equity ownerships, and private company reporting. He also has provided professional audit services to several large multinational clients in accordance with PCAOB and ISA requirements and under U.S. GAAP and IFRS and has successfully coordinated global engagements. Ryan has extensive knowledge in reporting under Section 404 of the Sarbanes-Oxley Act and internal controls implementation. His experience includes the evaluation of entity-level control frameworks under the COSO 2013 framework, the assessment of processes and related key controls, and the evaluation of design and operating effectiveness of key controls. Ryan has deep knowledge of auditing internal controls over financial reporting. He is the leader of the LaPorte Risk Advisory Services Group



Stan Dameron was appointed Commissioner of the Louisiana Office of Financial Institutions in February 2021 by Governor John Bel Edwards. Dameron is past president and CEO of American Bank & Trust in Covington and a U.S. Army Veteran. The Office of Financial Institutions (OFI) is responsible for the supervision of various entities which provide financial services to the citizens of the State of Louisiana. The Office is divided into three major divisions based on general types of institutions regulated - the Depository Institutions Division, the Non-Depository Services Division, and the Securities Division.



Joe Micallef is an Award-Winning Banker and Sales Expert with almost 30 years of banking and sales leadership experience in Australia, Canada and the USA. This valuable global experience has ideally positioned Joe to share insights on universal best practices for achieving career success and growing your Bank. As a Bank Leader, and now Professional Bank Coach, Joe has consistently produced record annual results for financial institutions across the globe and developed exciting career opportunities for hundreds of finance professionals. He has been recognized throughout his career for his strategic, collaborative and charismatic approach to achieving exceptional results. In 2014 Insurance Business magazine named him one of Canada's "Hottest Insurance Professionals" and in 2016 he won the Chicago Daily Herald Business Ledger's award for "Outstanding Services to Entrepreneurs". Joe is passionate about engaging, enlightening and energizing bankers to build an exciting career and achieve a better quality of life.



Eric Haar - Since 2016, Eric Haar has served as Director of Government and Industry Relations for the Federal Home Loan Bank of Dallas. Mr. Haar is responsible for the bank's legislative and regulatory initiatives, as well as the bank's outreach to various stakeholder groups. Mr. Haar served in a similar capacity for 10 years at the Federal Home Loan Bank of Topeka. Mr. Haar holds a BA from Taylor University in Upland, Indiana as well as an MBA from Indiana University's campus at Fort Wayne. He is also graduate of the Southwestern Graduate School of Banking at Southern Methodist University. Mr. Haar speaks frequently to audiences on the topics of banking and housing. He is also a Junior Achievement classroom volunteer, a meal server at the Dallas Men's Gospel Mission, a member of the Tarrant County Bankers Association board of directors, and a Rotarian.

GOLF SCRAMBLE

Golf Scramble at Lakewood Golf Club

Thursday, September 23, 2021

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.



CONFERENCE SPONSORS



Opening Reception Sponsor





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The Grand Hotel - Point Clear, Alabama

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: **\$390 LBA member, \$690 non-member** \$ _____
- ☐ Spouse/Guest: **\$125** - Name: _____ \$ _____
- ☐ Golf Scramble: Thursday, September 23 - **\$135 per person**
- Name: _____ \$ _____
- Pairing Request: _____
- Name: _____ \$ _____
- Pairing Request: _____
- ☐ **NEW!** Virtual Option - Live Stream via Zoom **\$390 LBA member, \$690 non-member** \$ _____
- 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 16, 2021 to avoid a \$175 cancellation fee. Substitutions are welcome at no additional charge.

Golf - Please cancel by September 16, 2021 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 9/24, wear your favorite sports team shirt.

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

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