



# Principles of Banking

*March 11-May 20, 2022*

***10 Week Virtual Course offered in weekly sessions on Fridays from 9am-11am, starting March 11 and ending May 20, 2022***

**For over 40 years, the American Bankers Association's Principles of Banking course has been respected as the most comprehensive introduction to the banking industry. Thorough, easily digestible, and detailed, this textbook and live, instructor-led course provide an overall understanding of the financial services industry. The Louisiana Bankers Association is pleased to once again offer the Principles of Banking course in a virtual format beginning on Friday, March 11, 2022 and ending Friday May 20, 2022. The course will be held each Friday during this time period from 9am-11am.**

## ***Program Overview & Highlights***

Principles of Banking will provide an overview of fundamental banking concepts and principles in a convenient instructor-led remote environment that incorporates peer collaboration. The course will run 10 weeks and include weekly assignments, a midterm exam and a final exam. The course size is limited to 30 participants.

This course will cover the following topics:

- Overview of banking functions, competitors and future trends
- Review of banking history including legislation, regulations and regulatory agencies
- Breakdown of bank financials – income statement, balance sheet and bank performance metrics
- Products and services – deposits, loans, financial planning, trust services and business banking
- Digital banking – payment systems, online banking, mobile banking and remote capture
- Enhancing customer relationships – bank involvement in the community, importance of cross-selling and relationship building as well as exceeding customer expectations
- The safeguarding of banks, their employees and their customers – fraud, corporate governance, privacy and cybersecurity risks

## ***Who Should Attend:***

Principles of Banking has direct applicability to a broad range of banking positions. This course will benefit:

- New bankers needing a broad knowledge of the banking industry
- Emerging bankers desiring a general understanding of the financial services industry
- Seasoned bankers seeking to gain a broader understanding of the banking industry
- Bank attorneys looking for an overview of the banking industry
- Any banker who would benefit from an understanding of the changing world of financial services

## ***Course Format***

Principles of Banking will be delivered on a video-conferencing platform which integrates with Zoom. Each week, participants will log into a 2-hour live session. These sessions are instructor-led by seasoned bankers. Participants will be able to see the instructor. **It is recommended that students use their webcam and have the ability to speak (either using a computer microphone or dialed in by phone).**

Prior to the course start date, participants will receive a 12<sup>th</sup> edition PRINCIPLES OF BANKING textbook and course curriculum.

- Participants will be expected to read each assigned chapter(s) and complete any assignments prior to the next week's class
- The midterm and final exams will be electronic and participants will have a window in which to complete them



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## Registration Fee and Registration Deadline

### Registration Fees:

LBA Member fee (Live Virtual Seminar) - \$495 (includes 12th Edition Principles of Banking Textbook)

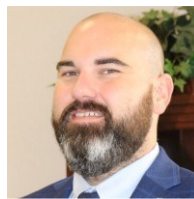
Non-Member fee (Live Virtual Seminar) - \$895 (includes 12th Edition Principles of Banking Textbook)

**Registration Deadline:** For our planning purposes and in order to have the textbook shipped to registered students prior to the first class, please register by **February 25, 2022.**

## Course Instructors



**Jake Guidry** is a Sr. Vice President / Commercial Banker at b1Bank in Lafayette. His banking experience expands over 15 years as he started in banking in early 2006 as a part-time teller for the former St. Martin Bank & Trust Co. In 2017, the CEO of b1Bank tasked Jake with the responsibility with assisting the Bank in the development of a scholarship program for employees of the b1Bank and their children. To date, the scholarship program has awarded \$51,000 in scholarship proceeds. Jake also serves as a market champion for b1Bank's Community Outreach Initiatives. Jake is a former graduate of the Graduate School of Banking at LSU where he helped lead his team to the top overall bank in BankSim. He is also a Past President of the Louisiana Bankers Education Council where he served on the board for over 10 years. In 2018, Jake assisted in the development of the Past Presidents Advisory Council for this organization. The organization's primary focus is to assist with banker development while also being a financial literacy arm within the banking community. Most recently, Jake graduated from Leadership Institute of Acadiana's Leadership Lafayette program in 2020. In addition to his professional accomplishments, Jake has served as an Ambassador for One Acadiana, member of the 705 Club of Lafayette, member of LIA, and is a Louisiana Notary Public.



**Adam J. Johnston** is Senior Vice President/North Louisiana Regional Banker with First Guaranty Bank. He received his Bachelor of Business Administration degree from Millsaps College in 2007. After graduating from Millsaps, Adam enrolled in the Master of Business Administration program at LSU and began working for a small, community bank in Bossier City in a management training program. Adam earned his MBA in 2009, and by that time, he had been promoted to Credit Officer in the bank. In 2011, he was recruited to join First Guaranty Bank, a larger community bank based in Hammond, Louisiana. Adam accepted the position where he grew the loan portfolio from \$4,000,000 to over \$50,000,000 in less than three years. In 2016, he was promoted to manage The Bank's \$200,000,000 National Loan and Lease portfolio, and he attained the title of Vice President. In 2018, he was promoted to Senior Vice President and Regional Manager, overseeing the lending activities of all seven FGB branches in North Louisiana. Adam and his wife Katie have three children (Jay, Emmie and Wright), and they make their home in Bossier City. Adam's accolades and civic contributions include: Louisiana Bankers Association Leadership School Graduate; Chairman, North Louisiana Economic Partnership; Young Professionals Initiative (Greater Shreveport Chamber of Commerce); 40 Under 40 (Greater Shreveport Chamber of Commerce); 40 Under 40 (Independent Community Bankers Association); Louisiana Bankers Education Council (Past President); Junior Achievement; Kappa Sigma Fraternity; United Way of Northwest Louisiana; Louisiana Methodist Children's Home; Millsaps College M-Club; LSUS Foundation; BOLT Program (US Federal Reserve); Graduate School of Banking at Louisiana State University; Shreveport-Bossier Rescue Mission; Greater Bossier Economic Development Foundation and Committee of One Hundred, Inc.

## Course Agenda *all courses held from 9am 11am unless otherwise noted*

Friday March 4 - Orientation via Zoom - 9am-10am

Friday April 15 - Good Friday Holiday - No Class

Friday March 11 - Chapter 1: Banks as Service Providers

Friday April 22 - Chapter 6: Lending

Friday March 18 - Chapter 2: Banks as Businesses

Friday April 29 - Chapter 7: Personal Financial Planning

Friday March 25 - Chapter 3: Deposit Accounts

Friday May 6 - Chapter 8: Business & International Banking

Friday April 1 - Chapter 4: Payments: Cash & Checks

Friday May 13 - Chapter 9 - Building Relationships

Friday April 8 - Chapter 5: Electronic Banking

Friday May 20 - Chapter 10 - Safeguarding Customers & the Bank

**Midterm Exam to be taken the week of April 11 (online).**

**Final Exam to be taken the week of May 23 (online).**



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## Registration Information (for multiple registrations, please make copies)

Name \_\_\_\_\_

Bank \_\_\_\_\_

Street Address (Textbook will be shipped to this address): \_\_\_\_\_

City / State/ Zip \_\_\_\_\_

Email Address \_\_\_\_\_

Office Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

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### Payment Options

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

Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_

Credit Card Billing address \_\_\_\_\_

Name on Card (Please Print) \_\_\_\_\_ Signature \_\_\_\_\_

Amount to be charged on card \$ \_\_\_\_\_

### Cancellation Policy

The price of this program is inclusive of all 10 sessions. If you must cancel your registration, please do so by February 25 to avoid a \$250 cancellation fee. Once the course begins, substitutions will not be allowed.

This training will be covered under SBET (Small Business Employee Training Program). Please provide an email address to receive the necessary documentation for reimbursement: \_\_\_\_\_



LouisianaBankers

ASSOCIATION

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

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