



EXECUTIVE MANAGEMENT CONFERENCE

September 21-23, 2022 • The Grand Hotel in 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

Who Should Attend

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

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 (855) 999-0490 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 30, 2022**. 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 9/20 and Friday 9/23), it is recommended that you call (855) 999-0490 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.)
- **Spa Building Bay View Room** - \$295+tax/night (Optional upgrade, based on availability. Please call for reservations.)

Check in time is 4pm. Check out time is 11am.



Executive Management Conference

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WEDNESDAY SEPTEMBER 21, 2022

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 22, 2022

Business/Resort Casual Dress

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

8:30am-9:30am **Building Resilient Cultures and Winning Bank Teams - Dave Martin,
Bank Mechanics - *Grand Ballroom North***

Building resilient cultures and winning teams requires more than a solid playbook or even charismatic personalities. Effective bank leaders must focus on communicating, modeling, and enforcing values that make a place of business one that good people want to remain a part of. Team members at all levels must strive day in and day out to support each other and to maintain a culture they are proud of - that customers will be drawn to over competitors. Bank technology gets better and more ubiquitous over time. In the long run, however, it does not tilt the playing field. It levels it. It will not truly differentiate one bank from another. Companies who attract, develop, and retain the best people will win. Always. Dave Martin will give his unique perspectives on the state of banking in a post-pandemic - but still turbulent – environment and share clear and actionable practices to build resilient cultures and winning teams for the future.

9:45am-10:45am **Five Critical Strategic Traps that Face U.S. Community Banks in 2022 -
Marty Mosby, ICBA Securities - *Grand Ballroom North***

While U.S. community bank earnings have been strong over the last couple of years, many of the positive earnings catalysts, like PPP and mortgage banking, should lessen going forward. We have identified five strategic traps that community banks need to address in order to sustain profitability levels while not adding too much incremental interest rate or credit risks: inflated earnings expectations, FASB115 mark-to-market risk, transition to new CECL accounting methodology, highly competitive loan pricing, and higher inflation creating an acceleration in employee compensation expenses. This session highlights how managements should approach and respond to these critical strategic decisions.

11:00am-12:00pm **Digital Assets and Bank Participation - Brooke Ybarra, ABA - *Grand
Ballroom North***

In this session we'll provide a framework for understanding different types of digital assets, including traditional cryptocurrency, stablecoin, and central bank digital currency. We'll discuss how banks are engaging in the cryptocurrency ecosystem, and review key policy and regulatory developments.

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 23, 2022

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 South**
- 8:30am-9:30am** **ESG, DEI, Economic Turmoil and More - Jeff Fair, American Planning Corporation - Grand Ballroom North**
- Our industry is facing many challenges, including volatile interest rates, increasing regulatory emphasis on ESG and DEI and the economic impacts of geopolitical turmoil. In this session, we will explore these topics and their impacts on strategic and operational decisions for community bankers.
- 9:45am-10:45am** **An Effective Vendor Management Program - Julia Gutierrez, Compliance Alliance - Grand Ballroom North**
- This session will focus on the importance of a bank's vendor management program. It will provide an overview of expectations, the benefits of a compliant program, and the costs for failure to comply. We will also cover recent changes, the 36-hour computer security incident notification requirements, and talk about how this impacts financial institutions.
- 11:00am-12:00pm** **Using Technology to Understand Customer Profitability & Behavior—Bob Kottler, Whiteclay - Grand Ballroom North**
- This session will explain how to use technology to understand and build customer profitability and understand customer behavior. Once built, we will explore how to leverage AI to understand primacy and use customer transaction information.
- 12:00pm** **Conference Adjourns**

CONFERENCE SPEAKERS



Dave Martin - Like many in the banking industry, Dave Martin was an accidental banker. After early careers as a radio morning man, marketing director for an oilfield industry supplier, and a stretch working in the finance department of a university research facility, Dave was recruited by a friend to join a bank. Specifically, he was hired to run that institution's first in-store branch location. Given more freedom (and less guidance) than most people hired to run a bank branch, Dave quickly learned that banking is a people business. Bank branches, products, and services tend to be (or are perceived to be) rather homogenous. If a bank is going to differentiate itself, it will be through its people – the moving parts of the organization. With in-store banking in his DNA, Dave also developed strong opinions on the power of small, talented teams and their abilities to outperform the status quo. Dave Martin was preaching the advantages of "Universal Bankers" long before the concept became cool. Two decades and stints as senior bank executive and trainer/consultant later, Dave's core beliefs about banking remain intact. Banking remains a people business, and organizations with good people win. Dave Martin has become one of the most prolific writers in the banking industry. His columns and newsletters are read in thousands of financial institutions each month. His keynote presentations, seminars, and podcasts have an authenticity and humor that brings teams of all sizes and seniority levels together. He is also a member of the guest faculty of the Southwest Graduate School of Banking at SMU. Dave is a lucky husband and proud dad of two sons and travels out of Houston, Texas.



Marty Mosby is Director of Bank Advisory & Strategic Services with ICBA Securities. Marty has been a bank research analyst for the past 10 years. He has utilized his past experience of managing a regional bank for two decades to cover 20 of the Largest U.S. Banks. Prior to covering banks, Marty had been an executive manager at First Horizon National Corporation where over his 20 year career he had served as Chief Financial Officer, Head of Investor Relations and Strategic Planning, ALCO Chairperson and Chief Economist. As CFO, Marty guided First Horizon through four years of Sarbanes-Oxley and directed the Treasury, Tax, Controller, M&A, Strategic Planning, and Investor Relations Departments. This has helped him gain a strong understanding of the banking industry which he has used to develop differentiated bank analysis and correlations of profitability to market valuations. He was ranked first by Integrity Research and Investors' performance, won Bank Analyst Annual Best Investor Relations at a Mid-Cap Bank award twice, and recognized by Investor Relations Magazine for one of the best Roadshows of any mid-sized company. Marty graduated from the University of Pennsylvania in 1988 with the degree of Masters of Arts in Economics and from the University of Memphis with the degree of Bachelor of Arts with Honors in Economics in 1986.

CONFERENCE SPEAKERS *(continued)*



Brooke Ybarra is the Vice President, Innovation Strategy for the American Bankers Association, where she leads market strategy and insight development on a wide range of fintech issues that impact the banking industry. Brooke has extensive experience in financial services as a consultant with Accenture (formerly First Annapolis Consulting) focusing on electronic payments issues. In addition, Brooke worked with Marriott International as Senior Director of Global Quality, leading the brand standard audit and accountability programs for the hospitality brand's 7,000+ global properties. Brooke also spent four years at the Central Intelligence Agency, where her last role was that of a Program Manager for the Office of Congressional Affairs. Brooke received her MBA from the McDonough School of Business at Georgetown University, where she was valedictorian of her class. She completed her undergraduate degree in chemical engineering from Stanford University.



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.



Jeff Fair is the President of American Planning Corporation, a consulting firm that specializes in financial and strategic planning, regulatory rehabilitation and investment banking services for community banks. American Planning currently serves as an outsourced CFO for over 50 community banks ranging in size from \$50 million to \$5 billion in assets. Over the last 29 years, Jeff has assisted in the successful formation of 16 community banks, completed over 60 merger and acquisition projects and performed over 700 bank stock valuations. Jeff holds a Masters of Finance from Louisiana State University, a Bachelor of Business Administration from Baylor University and the Certified Valuation Analyst designation.



Julia A. Gutierrez serves as the Compliance Alliance Director of Education; developing curriculum and presentations, as well as presenting at various schools and seminars; both live and in a livestream/hybrid format. Julia brings over 20 years of financial industry experience to the Compliance Alliance team. She began her career in banking in 2000 while receiving her Bachelor of Business Administration degree in Finance from the University of Alabama. Her compliance knowledge and understanding derive from her combined experience in community banks and consulting. Ms. Gutierrez served as a Risk Management and BSA Officer, assisted in the development of an enterprise-wide risk management and compliance program for a de novo institution, assisted in the compliance remediation efforts for an institution who was referred to the DOJ, held positions in retail and branch management, and was a Senior Compliance Advisor for a large regulatory compliance consulting firm. In addition, Julia also joins the Hotline from time-to-time where her experience is invaluable as a resource. She also is one of our featured authors for both the monthly B/A Access magazine and for articles published by state banker associations across the nation.



Robert M. Kottler is Executive Vice President and Chief Revenue Officer of Whiteclay, a leading provider of Banking software and solutions, after a 37-year banking career. In his role, he is responsible for regional bank relationships and partnership opportunities. Prior to the merger of Iberiabank and First Horizon, Bob was Executive Vice President and director of Retail, Small Business and President of Iberiabank Mortgage. In this role, Bob was responsible for the retail segment, including digital sales and service, direct bank and call centers, retail operations, product management, payments including debit and credit cards, branch support, small business and mortgage. Mr. Kottler earned his B.S. in management and his M.B.A. from Tulane University. He is also a graduate of the Graduate School of Retail Banking, Consumer Bankers Association, at the University of Virginia.

GOLF SCRAMBLE

Golf Scramble at Lakewood Golf Club

Thursday, September 22, 2022

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 12:00pm 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.



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Executive Management Conference

September 21-23, 2022

The Grand Hotel - Point Clear, Alabama

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

Name _____
 Bank _____
 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 22 - **\$135 per person**
 Name: _____ \$ _____
 Pairing Request: _____
 Name: _____ \$ _____
 Pairing Request: _____
 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 15, 2022 to avoid a \$175 cancellation fee. Substitutions are welcome at no additional charge.

Golf - Please cancel by September 15, 2022 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 9/23, 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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