



2024 EXECUTIVE MANAGEMENT CONFERENCE

SEPTEMBER 18-20, 2024 | THE GRAND HOTEL IN POINT CLEAR, ALABAMA

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:**
\$450 members/\$750 non-members
 - **Spouse/Guest Fee:** \$125
 - **Golf Scramble:** \$199
 - **Pickleball Tournament:** \$100
- **Guest Program Floral Hands-On Class:** \$150

Who Should Attend

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

Hotel Information at The Grand Hotel, Point Clear

LBA has contracted for a set number of sleeping rooms at The Grand Hotel based on the last few year's 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), [Click here to book online](#) Or please call Marriott Reservations (800) 544-9933 and identify that you're booking with the Louisiana Bankers Association Executive Management Conference Room block.

The deadline to receive the group rates is **August 27, 2024**. After that date, reservations will be made based on availability and the hotel may not be able to honor the discounted rates. LBA has contracted rooms for Tuesday September 17, Wednesday September 18, Thursday September 19, Friday September 20 and Saturday September 21.



Group Room Rates:

- **Deluxe Resort View Room** - \$249+tax/night
- **Deluxe Bay View Room** - \$309+tax/night (Optional upgrade, based on availability)
- **Spa Building Resort View Room** - \$279+tax/night (Optional upgrade, based on availability)
- **Spa Building Bay View Room** - \$319+tax/night (Optional upgrade, based on availability)

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



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Wednesday September 18, 2024

Business/Resort Casual Dress

- 3:00pm Registration Opens, *Grand Ballroom Foyer*
- 6:00pm-8:00pm Opening Reception, *Julep Point*
Sponsored by Louisiana Bankers Service Corporation

Thursday September 19, 2024

Business/Resort Casual Dress

- 7:00am-8:30am Breakfast featuring Sponsor Spotlight - *Grand Ballroom South*
- 8:30am-9:30am **A Look to the Future: The Financial Services Industry in 2044**
Greyson Tuck, Gerrish Smith Tuck, PC - Grand Ballroom North
What does the future hold for community banks? What do community bankers need to do to stay relevant? In this session, you will gain insights on how to prepare for the future of banking.
- 9:45am-10:45am **Credit Score Modernization**
Tony Hutchinson, VantageScore Solutions and Ethan Dornhelm, FICO Score
Grand Ballroom North
FHFA announced that it will upgrade and modernize credit score models used for loans sold to Fannie Mae and Freddie Mac. The GSEs will transition from “tri-merge” to “bi-merge” requirements, and scores will be based on FICO 10 T and VantageScore 4.0. Hear directly from FICO and VantageScore about the details of these new scores, and how their adoption could impact your underwriting.
- 10:00am-1:00pm **Guest Program: Floral Hands-On Class - See Page 4 for more information**
- 11:00am-12:00pm **Will Fintech or Payment Providers Help or Hurt my Bank?**
Danny Henderson, Banc Card of America - Grand Ballroom North
Attend this session to see how some Fintech companies could be siphoning deposits, loans and even NII from your bank. Understanding this landscape and what are the red flags that will help you determine whom you want to partner with. Collaborators can help grow your bank versus disintermediation. What are the top products and services you need to help your clients now and, in the years to come. Walk away with an actual game plan of what you might consider doing to evaluate your current situation and plan for the future. Non-Interest bearing deposits and NII are critical for a banks health and the right partners are crucial for your success.
- 12:00pm Sessions Adjourn
- 1:00pm-5:00pm **Golf Scramble - See Page 6 for more information**
**Box lunches will be provided prior to start, beginning at 12pm.*
- 1:00pm-3:00pm **Pickleball Tournament - See Page 6 for more information**
**Box lunches will be provided prior to start, beginning at 12pm.*
- Evening on Your Own

Friday September 20, 2024

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

- 7:00am-8:30am Breakfast with Sponsor Spotlight and Office of Financial Institutions
Update by Scott Jolly, Commissioner - *Grand Ballroom South*



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Friday September 20, 2024 (continued)

8:30am-9:30am

Louisiana Residential Real Estate Conditions

Domonic Purviance, Federal Reserve Bank of Atlanta - *Grand Ballroom North*

At the beginning of the year, there was growing optimism around improving housing demand. Inflation was trending downward, job growth remained persistent, home price growth had moderated, and mortgage rates had come down from their recent peaks. However, through the peak of the 2024 home selling season, declining home ownership affordability has reemerged as a significant challenge facing the market. As both home prices and mortgage rates trended upward, and non-principal and interest costs have risen as well, buyers today are adjusting to the new reality of the cost of homeownership. In the months ahead, lenders, builders, and other market participants will continue to face challenges as they struggle to navigate the ever-changing housing market landscape. During this session, we will discuss these challenges and the potential impact on the housing sector.

9:45am-10:45am

Next in Line: Strategic Succession Planning for Community Bank Leaders

Frank Hopkins, Frank Hopkins Executive Coaching - *Grand Ballroom North*

Join us for a focused power-hour dedicated to enhancing your bank's succession planning efforts. This session will demonstrate how to effectively assess and develop leadership capabilities critical for succession. Learn practical strategies to: (1) Identify and groom high-potential leaders; (2) Integrate your succession planning process into your daily operations; and (3) Ensure a seamless leadership transition. You will be able to equip your community bank with the tools and insights to build a resilient, future-ready leadership pipeline that allows you to continue into the next generation.

11:00am-12:00pm

2024 Legislative Wrap Up

Dr. Steven Procopio, PAR Louisiana - *Grand Ballroom North*

The new administration and legislative moved at breakneck speed. In this session we will review what happened with a focus on insurance reform and the proposed constitutional convention and amendments.

12:00pm

Conference Adjourns

Conference Speakers



Greyson E. Tuck is President of both the Memphis based law firm of Gerrish Smith Tuck, PC and Gerrish Smith Tuck Consultants, both of Memphis, Tennessee. Mr. Tuck's legal and consulting practice places special emphasis on community bank holding company formation and use, community bank mergers and acquisitions, regulatory matters, corporate reorganizations, corporate taxation, general corporate law and community bank strategic planning. Mr. Tuck comes from a community banking family. He is a graduate of the University of Tennessee, where he majored in Accounting and Finance, and received his law degree from the University of Memphis Cecil C. Humphreys School of Law, where he was a Herff Scholar. Mr. Tuck is a graduate of the Paul W. Barret, Jr. School of Banking and currently serves as a faculty member at a number of banking schools across the country. He is a frequent presenter at national and state bank association conferences and has authored a number of articles of interest to financial institutions.



Anthony Hutchinson is the Senior Vice President of Industry and Government Relations at VantageScore. He brings nearly 30 years' experience and a wealth of knowledge about the inner-workings of Congress and the Executive Branch, as well as, a deep understanding of the housing industry to his current position. He has helped shape public policies critical to the housing industry, including the Dodd-Frank Financial Reform Law, and the subsequent Qualified Mortgage (QM) and Qualified Residential Mortgage (QRM) rulings, which ensured that homeownership remained affordable and accessible for all qualified homebuyers. Prior to joining VantageScore, Anthony was the Director of Government and Industry Relations at Freddie Mac where he oversaw the Enterprises' relationships with industry partners (e.g., American Bankers Association, Independent Community Bankers Association and Mortgage Bankers Association). He liaised with these organizations to gain an understanding of the business needs and the impact of Freddie Mac policies on their membership. The intelligence gathered and shared with the Enterprise was used to cultivate better industry partnerships and improve housing finance experiences for the consumer. Anthony Hutchinson has a Bachelor's of Science (B.S.) degree in Geography from the Pennsylvania State University, and a Master's of Business Administration (M.B.A.) from the University of Maryland, University College.



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Conference Speakers (continued)



Ethan Dornhelm, Vice President, FICO Scores and Predictive Analytics, leads the research and analytic development of FICO® Scores in the U.S. and Canada. Ethan is responsible for maintaining the predictive power the core product line as well as research and development of new scoring products, alternative data, analytic methodologies and machine learning implementations. Most recently, his diverse and high-performance team launched the newest FICO® Score 10 Suite, as well as the alternative data-driven solutions FICO® Score XD 2 and the UltraFICO® Score. Ethan's team also develops the analytic features available to millions of consumers via FICO's B2C solutions -- myFICO.com and FICO® Score Open Access. Ethan has a B.S. in management science/operations research from UC San Diego.



Danny Henderson is an Executive Vice President and Director at Banc Card of America based in Nashville TN. Currently residing in Houston TX, Danny has spent the last 25 plus years working with banks and as a banker himself. His experience in Treasury Payments, Commercial and Retail banking, coupled with years of service in helping Community Banks grow has given him a great landscape and perspective. His experience in how FinTech, payments and other technologies will impact our clients and our banks has been developed by working alongside hundreds of banks and their partners. Navigating if a FinTech or Payments provider will be a collaborator or disintermediator for your bank is critical and Danny is uniquely qualified to help you understand and acquire collaborative technologies to grow your bank.



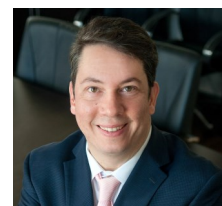
Domonic Purviance serves as a Subject Matter Expert within the Supervision Regulation and Credit Division at the Federal Reserve Bank of Atlanta. In this function, Mr. Purviance is primarily responsible for conducting an ongoing assessment of risks associated with residential real estate markets and the potential impacts they may pose to the financial system. This includes analyzing conditions within individual markets as well as the impacts of external forces on real estate. In addition, Mr. Purviance is responsible for developing real estate related analytical reports and tools utilized internally throughout the Federal Reserve System to aid in risk surveillance and banking supervision as well as external tools such as the Home Ownership Affordability Monitor (HOAM). Mr. Purviance also frequently engages in public outreach on the behalf of the Federal Reserve by speaking at public conferences and events as well as contributing commentary to the Beige Book, a publication produced by the Federal Reserve on economic conditions by district. Prior to joining the Federal Reserve, Mr. Purviance served as the President of Market Advisory

Services, LLC, a research and consulting firm that provides analytics for developers, homebuilders, and lenders to assist in property valuations and to help assess the viability of submarkets for new development. Mr. Purviance also previously served as a Senior Consultant at Metrostudy, a residential real estate research company, where he was responsible for the firm's consulting operations in the Atlanta region. Mr. Purviance received his B.A. in Urban Planning from Morehouse College and his Masters in City and Regional Planning for Georgia Tech.



Frank Hopkins is the founder of Frank Hopkins Coaching LLC, a premier leadership and organizational health consulting firm. As a trusted advisor, consultant, and coach, Frank and his team specialize in transforming Community Bank Executive teams from functional groups into high-performing, cohesive units. His approach helps these teams crystallize their leadership potential and cultivate healthier organizational dynamics. With a deep commitment to effective leadership development, Frank brings a wealth of certifications and expertise to his role. He is accredited as a PCC with the International Coach Federation and holds certifications in Leadership Circle Profile, Collective Leadership Assessment, and Leadership System. As a CapaPro Affiliated, Certified Corporate Team and Leadership Coach, and with certifications in EQi2 Emotional Intelligence Assessment as well as Six Working Genius,

Frank and his team are well-equipped to enhance executive capabilities at all levels. A founding member of the Leadership and Corporate Coaching Egghead Collaborative and an iPEC Certified Professional Coach, Frank's educational background includes a BLA from Louisiana State University. His work is dedicated to enabling CEOs and top teams to fulfill their leadership promise and develop and sustain healthy, effective organizations.



Dr. Steven Procopio joined the Public Affairs Research Council of Louisiana as Policy Director in 2014 where he guided PAR's research agenda. In 2021 Steven was chosen to continue to lead PAR as the organization's President. He previously served as Chief of Staff of the Louisiana Division of Administration where he worked on a number of transparency and fiscal issues. Prior to working at the Division, Steven was the Director of Research and Accountability for the Lt. Governor's office and the Department of Culture Recreation and Tourism. In that role he was responsible for research on Louisiana's cultural economy and legislative initiatives. Steven is also the original Director of the Louisiana State University Public Policy Research Lab where he worked on a variety of policy issues

for state agencies, nonprofits and academic researchers. Steven is an Alexandria native with undergraduate and graduate degrees in Political Science from LSU. His doctorate in Political Science is from Indiana University. He has expertise in statistical techniques, mathematical modeling and survey analysis.

Thank you to Our Conference Sponsors



Opening Reception Sponsor



Conference Activities

Golf Scramble at Lakewood Golf Club

Thursday, September 19, 2024

1:00pm-5:00pm

\$199 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.



Pickleball Tournament at Lakewood Club

Thursday, September 19, 2024

1:00pm-3:00pm

\$100 per person (includes equipment, court time and box lunch)

Join us for the first pickleball tournament at LBA's Executive Management Conference! Pickleball is a sport that is fun for everyone as it combines many elements of tennis, badminton, and ping pong and is quite easy to pick up, which contributes to it being one of the fastest growing sports. Pickleball courts at The Grand Hotel opened in the fall of 2023. Pro-shop staff at the Lakewood Club will assist us with running this tournament. We will plan for doubles play.



Spouse/Guest Program: Floral Hands-On Class

Thursday, September 19, 2024

10:00am-1:00pm

\$150 per person (includes class and plated lunch)

Join the Grand florist for a fun and informative hands-on class. You will learn tips on arranging and caring for beautiful floral bouquets for your home. These helpful tips will allow you to create your own floral masterpieces. In this hands-on class, you will create a floral arrangement that you can take with you to enjoy in the days to come.

This class also includes a plated lunch.

Please notify us of any allergies.





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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: **\$450 LBA member, \$750 non-member** \$ _____
 - Spouse/Guest: **\$125** - Name: _____ \$ _____
 - Golf Scramble: Thursday, September 19 - **\$199 per person** \$ _____
4-person teams. Please indicate any pairing requests. We will do our best to accommodate.
 Name: _____
 Pairing Request: _____
 Name: _____
 Pairing Request: _____
 - Spouse/Guest Program: Floral Hands-On Class: Thursday, September 19 - **\$150 per person**
 Name: _____ \$ _____
 - Pickleball Tournament: Thursday, September 19 - **\$100 per person** \$ _____
Doubles Play. Please indicate your pairing request.
 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 12, 2024** to avoid a \$175 cancellation fee. Substitutions are welcome at no additional charge.

- Golf - Please cancel by September 12, 2024 to avoid a \$75 cancellation fee
- Pickleball - Please cancel by September 12, 2024 to avoid a \$50 cancellation fee
- Cooking Class - Please cancel by September 12, 2024 to avoid a \$50 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, www.lba.org