

WHAT YOU'VE BEEN WAITING FOR...

# Senior Management Conference Lineup

*A day full of expert speakers & topics you can't afford to miss*

**SEPTEMBER 28TH**

**8:30 AM - 3:15 PM**

**GRAND GENEVA RESORT & SPA**

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# Manage Like You Mean It

8:00am – Registration & Continental Breakfast

8:30am – *Update on YOUR Federal Home Loan Bank*

Matt Feldman, President & CEO, FHLBC

Matt Feldman, President and CEO, FHLB Chicago will address the Bank's financial highlights, community investment activity, member engagement survey results, provide a legislative and regulatory update and lastly, address the 2018 Director Elections. There will also be time for Q&A so come prepared with any questions you may have for Mr. Feldman.

9:15am – *Positive Policy Environment*

Cecelia Calaby, Senior VP – Office of Regulatory Policy, ABA

The first bipartisan legislative action in many years adds to the impetus for reevaluation of the regulatory environment. With new agency principals in place, we have real opportunity for progressive change.

10:00am – Stretch Break

10:15am – *Regulator Panel Discussion*

Surge Sen, Assistant Regional Director, FDIC  
Nathan Perry, Assistant Deputy Comptroller, OCC  
Hilario Gonzalez, Assistant Regional Director, CFPB

Hear the hot topics within today's regulatory environment impacting all financial institutions. A panel of regulators will share their views on emerging regulatory issues and field questions from the listeners.

11:00am – *Retirement Planning for Bank Owners & Key Executives*

David Fritz, Managing Partner, Executive Benefits Network

As Senior Leadership teams in the banking industry approach retirement, developing the bank's succession plan is critical. Equally as important is retirement planning, estate planning & key employee retention. EBN will discuss five key areas including succession planning that need to be addressed when looking at the future of the bank.



# Manage Like You Mean It

11:45am - Break for Lunch

## 12:45pm - Rapid Fire Roundtable Topics

### **Cyber Security and Risk Management**

What threats have you seen? Increasing/decreasing over the last 3 years?

What solutions to reducing the risk of security breaches do you use/have seen work well?

Thoughts on consortium building to address/improve risk management?

### **Managing the New Wave of Next-Gen Examiners**

What challenges do you see/experience with the next generation of examiners?

What are your thoughts in addressing these challenges?

What risks do you see coming from near term examinations?

### **Customer Experience Improvement - T.J. Burge Moderating Discussion**

What tech focused initiatives are you deploying to attract/retain customers?

How do you define the delivery of outstanding customer service? What are you doing to achieve this?

What non-technology initiatives are you deploying to improve your customer experience?

How are you staying on top of the changing demographic of your customers?

2:15pm - Stretch Break

## 2:30pm - Brewing Up a Winning Portfolio

Marc Gall, Vice President, BOK Financial

Josh Hunt, Vice President, BOK Financial

Pairing the bank's investment portfolio with overall goals and objectives of the institution is critical. While bonds come in many different flavors, not all may be a fit for your bank. At this session, participants will tap new ideas for managing the investment portfolio as a component of the overall balance sheet. As an added bonus, we will juxtapose bond selection with sampling craft brews from IL and WI.

3:15pm - Adjourn

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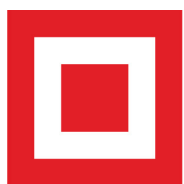
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