



Location & Accommodations

The Ritz-Carlton, New Orleans
921 Canal Street
New Orleans, LA 70112

At the Ritz-Carlton, New Orleans, located on the edge of the French Quarter, The experience of the city comes to life as soon as guests cross the threshold of the historic luxury hotel. Set within the 1907 Beaux Arts Maison Blanche building, The Ritz-Carlton highlights traditional Southern ambience with an elegant interior that reflects the graciousness of antebellum mansions.



Group Room Block Information

The LBA has contracted for a set number of sleeping rooms at The Ritz-Carlton, New Orleans based on the last few years' convention 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 of **\$295+tax/night**, please call 1-800-826-8987 and identify that you're booking with the Louisiana Bankers Association Annual Convention room block. The deadline for the discounted sleeping room rate is **April 17, 2017** at 5:00pm or until the block of rooms for LBA is filled, whichever is sooner. After April 17, 2017 reservations will be made based on availability and the hotel may not be able to honor the discounted rate. Reservations can also be made online at:

Deluxe King Accommodations: [Click here](#) for online reservations. Group Code is UITUITA

Deluxe Double/Double Accommodations: [Click here](#) for online reservations. Group Code is UITUITB

Club Level King Accommodations (\$445+tax/per night): [Click here](#) for online reservations. Group Code is UITUITD.

The Ritz-Carlton Club ensures an added measure of excellence at every moment during your stay. With continuous culinary offerings throughout the day and rooms designed to transport guests into their own Garden District mansion - it is the ideal place to conduct business, plan an outing or simply unwind.

2017 Convention Agenda

Wednesday May 10, 2017

- 4:00pm-6:00pm **Registration Open**
(Grand Ballroom Foyer)
- 6:00pm-8:00pm **Exhibit Hall Grand Opening Reception** (Grand Ballroom)
Sponsored by Louisiana Bankers Service Corporation

Thursday May 11, 2017

- 7:00am-8:30am **Exhibit Hall Breakfast** (Grand Ballroom)
- 8:00am-8:50am **General Session** (Lafayette Ballroom)

Opening Remarks:

Robert Taylor, Chief Executive Officer
Louisiana Bankers Association

Office of Financial Institutions Update

Sid Seymour, Chief Examiner and Christine Kirkland,
Deputy Commissioner
Louisiana Office of Financial Institutions

- 8:50am-9:20am **American Bankers Association Update**
(Lafayette Ballroom)
Rob Nichols, ABA President & CEO
- 9:20am-9:35am **Exhibit Hall Break** (Grand Ballroom)
- 9:35am-10:35am **General Session** (Lafayette Ballroom)

Creating and Sustaining a Bank Culture Known By All as a Great Place to Work

Dr. Bob Brewer, Lead the Team

What makes employees walk out of your bank and become your worst PR nightmare? Why don't employees do what you want them to do with a high level of consistent excellence in everything? How do managers make your bank a lousy place to work for millennials---and everyone else as well? How do managers create a work environment of constructive conflict and authentic camaraderie in the midst of inflated egos and toxic competition? How do managers transform an unhealthy culture of sloppy accountability, abundant excuse making and sub-par performance into a great place to work? How does your leadership team inspire and encourage employees to celebrate the "HeartPower" of gratitude and mutual trust and respect? Discover practical, user-friendly options to address these critical issues in your bank. Walk out of this high energy session with an action plan that you can implement for success the day after you return to your bank

10:00am-2:15pm - Guest Program: Rock 'N' Bowl and 1950s Swing Dance Lessons and Lunch
(Cancelled)

- 10:35am-10:50am **Exhibit Hall Break** (Grand Ballroom)

10:50am-11:50am Concurrent Sessions (Choose One)

Session One (Lafayette Ballroom)

Why Bank Strategy & Strategic Planning Matters Suzanne Donner, Dixon Hughes Goodman LLP

We believe that the strategic planning process has never been more crucial to how we manage our business and has taken on an even more important role in the way examiners look at our institution. With that in mind, this session will focus on the best process for creating your plan, understanding the key components of a great plan, and the ongoing requirements to make certain you "live" that plan.

Session Two (Audubon Room - 1st Floor)

CECL - It's Time to Dive In

Jeff Fair, American Planning Corporation

The Current Expected Credit Loss model is one of the most far-reaching bank accounting changes in decades. The effective date for CECL implementation is still over two years away, but now is the time to begin planning and collecting data. This session will provide an up-to-date look at the key provisions of CECL, best practices for preparation, the types of data you should consider gathering and resources available from core vendors and other service providers.

11:50am-1:00pm **Exhibit Hall Lunch** (Grand Ballroom)

1:00pm-2:00pm Concurrent Sessions (Choose One)

Session One (Lafayette Ballroom)

Guiding Your Organization Into a Promising Future Brian Church, Experience Global

We live in a world of change. At times our companies are dependent upon change in order to ascend the next mountain or to avoid the next abyss. When guiding your organization into the future, you must prepare yourself and the organization for the proverbial deltas (pivots) that lay ahead. This session will help your leaders do the following: (1) Learn how to shift your organization's internal and external culture; (2) Learn why people fail at change management; (3) Learn the consequences of "change failure"; (4) Learn how to comfortably create urgency; (5) Learn how to create a steering coalition; (6) Learn how to create a "new vision"; (6) Learn how to empower action and to get the early win; (7) Learn how to incorporate change into your culture.

Session Two (Audubon Room - 1st Floor)

Non-Qualified Options for Recruitment and Retention Trisha Morrison and Dylan Major, The Pangburn Group

Are you losing key contributors to competing banks? Perhaps you are recruiting a new executive who is having a hard time giving up existing benefits with his or her current bank to join your institution? There can be much more to "sweeten the compensation pot" beyond salary, bonus, and a traditional 401(k) plan. In fact, often a 401(k) plan can fall short in providing a meaningful benefit that provides retirement security to executives. Nonqualified executive benefits plans can often fill gaps in both an executive's retirement planning and an institution's benefits offering. During this session, you will learn how a nonqualified plan can be a useful tool in recruiting and retaining key employees. You will leave the session with an understanding of the pros and cons of sponsoring a non-qualified plan, plan design trends (particularly in the community bank market), basic accounting and tax implications of sponsoring a plan, and learn what is involved in the design, implementation, and ongoing maintenance of a plan.

2017 Convention Agenda

Thursday May 11, 2017 (continued)

2:00pm-2:15pm **Break** (*Grand Ballroom Foyer*)

2:15pm-3:15pm **Concurrent Sessions (Choose One)**

Session One (*Lafayette Ballroom*)

Guiding Your Organization Into a Promising Future

Brian Church, Experience Global

We live in a world of change. At times our companies are dependent upon change in order to ascend the next mountain or to avoid the next abyss. When guiding your organization into the future, you must prepare yourself and the organization for the proverbial deltas (pivots) that lay ahead. This session will help your leaders do the following: (1) Learn how to shift your organization's internal and external culture; (2) Learn why people fail at change management; (3) Learn the consequences of "change failure"; (4) Learn how to comfortably create urgency; (5) Learn how to create a steering coalition; (6) Learn how to create a "new vision"; (6) Learn how to empower action and to get the early win; (7) Learn how to incorporate change into your culture.

Session Two (*Audubon Room - 1st Floor*)

Spring to Compliance Success! BSA/AML Hot Topics that Every Board Member Needs to Know in 2017

Kimberly Boatwright, TRUPOINT Partners

This session is designed to provide insight into BSA/AML programs and what you as a Board Member or senior manager need to know and understand about the program. We will focus on the four pillars of the program in addition to the new due diligence rules that are being coined as the "fifth" pillar of your institution's program.

6:30pm-9:00pm **"A Night at the Sockhop" Banquet**

Ritz Carlton, 2nd Floor



Joins us for a 50's Sock Hop! Cocktails and dinner buffet will begin at 6:30pm followed by a 50s inspired theme show.

Friday May 12, 2017

7:00am-8:30am **Breakfast** (*Grand Ballroom*)

8:00am-8:30am **LBA Business Session** (*Lafayette Ballroom*)

Tom Martin, LBA Board Chairman

Director Elections

Installation of New LBA Chairman

Service Award Presentations

8:30am-9:00am **Independent Community Bankers of America Update** (*Lafayette Ballroom*)
Paul Merski, Group Executive Vice President, Congressional Relations & Strategy, ICBA

9:00am-9:15am **Break** (*Grand Ballroom Foyer*)

9:15am-10:15am **General Session** (*Lafayette Ballroom*)

The Power of Integrity

Colonel Arthur Athens, Vice Admiral James B. Stockdale
Center for Ethical Leadership, U.S. Naval Academy

Integrity is essential for living lives of purpose and impact and building teams founded on trust and commitment. This presentation answers four key questions: (1) What do we mean by integrity? (2) What does integrity look like in action? (3) How does a leader maintain his or her integrity, particularly in challenging circumstances? and (4) How does a leader create an organizational climate of integrity?

10:15am-10:30am **Break** (*Grand Ballroom Foyer*)

10:30am-11:30am **General Session** (*Lafayette Ballroom*)

Making Sure Your Board is On Board

Jack Vonder Heide, Technology Briefing Centers

Director responsibility for IT risk and strategy has become more consequential as customers continue their migration to electronic delivery channels. However, the BankDirector 2016 Technology Survey revealed that 45 percent of bank boards do not have a single director with technology expertise and 51 percent only discuss technology issues once a quarter. This informative session discusses practical steps banks across the country are taking to help bring about a fundamental change in boardroom culture by raising awareness, closing knowledge gaps and ensuring that the opportunities and risks posed by technology take a much higher priority on the boardroom agenda.

11:30am **Convention Adjourns**

Convention Attire

Attire for all convention events is business casual. For the Thursday evening banquet, dress in 50s attire or business casual.

Mandatory Continuing Legal Education (MCLE)

This program has been approved for 7.0 MCLE credit hours with the Louisiana Supreme Court. If you are interested in applying for legal credit hours for the convention, please see the LBA registration desk at the convention for the form to complete.

Featured Speakers



Brian Church is a published author and accomplished speaker who is dedicated to training people in the US and abroad in the art and science of creating “Relationship Momentum”. Brian serves as Chairman of Experience Global and he heads Vision, Strategy and Relationship Management for the company; he also co-authored the book “The Experience: The 5 Principles of Disney Service and Relationship Excellence.” In addition to his work with Experience, Brian is the founder and Chief Executive Officer of a Consulting Firm called Ambassadors International. The company specializes in working with corporations, advisors, entrepreneurs and Intellectual Property Holders to create what Brian calls “Relationship Momentum”. The Business Ambassador firm has a client list that ranges from companies specializing in renewable energy to investment management and financial advisory. Brian has consulted for Fortune 100 Companies, Global Non Profits and is currently working some of the fastest growing companies in the US.



Colonel Arthur J. Athens is the Director of the U.S. Naval Academy's Vice Admiral James B. Stockdale Center for Ethical Leadership and a member of the Academy's Senior Leadership Team. Colonel Athens retired from the Marine Corps in July 2008 with over 30 years of combined active duty and reserve service. As a Marine Officer, he commanded units in the 3rd and 4th Marine Aircraft Wings, served with the U.S. Space Command and instructed at Marine Aviation Weapons and Tactics Squadron 1, the Marine Corps' equivalent of the Navy's Top Gun School. Additionally, he was a White House Fellow under President Ronald Reagan; the Special Assistant to the NASA Administrator following the Space Shuttle Challenger accident; the Executive Director of OCF, a worldwide non-profit organization helping military personnel integrate their faith and profession; the Commandant of the United States Merchant Marine Academy; and the Naval Academy's first Distinguished Military Professor of Leadership. Aside from his professional responsibilities, Colonel Athens has been a volunteer lacrosse coach at the high school and collegiate levels and the Washington Post recognized him as their High School Coach of the Year. Colonel Athens holds a bachelor's degree in operations research from the Naval Academy where he lettered in lacrosse and served as the Brigade Commander, the senior ranking midshipman at the Academy. He also earned masters' degrees from the Naval Postgraduate School and the Army's School of Advanced Military Studies.



Jack Vonder Heide is one of America's leading authorities on technology and its impact on American business. He is consistently ranked among the top speakers at industry conventions, management conferences, corporate seminars, board meetings and other events. Prior to founding Technology Briefing Centers, Jack held marketing positions with IBM Corporation and senior management roles in the technology sector. Jack is regularly quoted in the Wall Street Journal and other top-tier newspapers and magazines. In 2015, Money Magazine named him “one of America's leading authorities on technology-related risks.” Jack appears on television and radio programs throughout the country and has been a guest lecturer at Harvard Law School.

Guest Program

Rock 'N' Bowl with 1950s Swing Dance Lessons and Lunch

**Thursday, May 11, 2017
10:00am - 2:15pm**

***Please note: The guest program has been cancelled due to low registration.**



REGISTRATION

Please complete this form and return to Louisiana Bankers Association, 5555 Bankers Avenue, Baton Rouge, LA 70808 with your payment, or fax it to 225-343-3159. Please print or type clearly.

***For additional registrants, please copy this form.**

Registrations can also be submitted in the Education Section of LBA's website at www.lba.org.

Name _____

Bank/Firm _____

Spouse/Guest Name _____

Street Address _____

City/State/Zip _____

Office Phone _____ Fax _____

Cell Phone _____

Email _____

Convention Fees:	\$649 Banker
	\$399 Spouse/Guest
Ten or more bankers and/or directors from same bank:	\$629 Banker
	\$379 Spouse/Guest

PAYMENT OPTIONS

- Check (Made Payable to Louisiana Bankers Association)
- Visa Mastercard
- American Express

Card Number _____

Expiration Date _____

Name on Card (please print) _____

Signature _____

Billing Address _____

Amount to be charged on card \$ _____

FEES

<u>Number</u>	<u>Total</u>
_____ Primary Registrant, \$649/ea.	_____
_____ Spouse/Guest, \$399/ea.	_____

Total \$ _____

CANCELLATION POLICY

Due to the commitments we must make, if you must cancel your registration, please do so by **May 3, 2017**. Cancellations received after May 3, 2017 will not receive a refund.