LouisianaBankers
ASSOCIATION

2026
Human Resources, Security and Marketing *New Addition Conference

August 20-21, 2026

The Ritz-Carlton
New Orleans

Registration Fees:
$475, per LBA Member
$675, per Non-Member

Who Will Benefit:
Human Resources Managers/Directors; Additional Human Resources Staff; Security Officers; Security Staff including Cybersecurity staff and Marketing Managers/Directors and Staff

Register online at www.lba.org

AGENDA

THURSDAY AUGUST 20

8:00AM - 9:00AM

CONTINENTAL BREAKFAST & REGISTRATION

Grand Ballroom Foyer, 2nd Floor

HR, Security & Marketing

9:00AM - 10:00AM

JOINT SESSION

Salon I

HR, Security & Marketing

The Most Dangerous Content on Your Page Isn't Yours: How User-Generated Content, Scams and Bots are Redefining Social Media Risk in Banking

Jill Williams, Spring Media Solutions

The greatest risk on your bank's social media isn't what you post, it's what others say and do on your page. User-generated content, scams, bots, deepfakes, and account takeovers are quietly reshaping your bank's risk exposure. In this session, you'll see how it happens, and what you should be doing now to monitor, manage, and document it.

10:15AM - 11:15AM

BREAKOUT SESSIONS

Choose One

Security Tract

Robbery Preparedness: Prevention, Recovery & Response

Salon I

Carol Dodgen, Dodgen Security Consulting

Bank robbery is one of the most serious threats facing financial institutions. Though we have seen a decline in the number of cases recently, bank robberies can still happen anywhere at any time. Being prepared is the best way to protect your employees, your customers, and your assets. This session takes a thorough approach to robbery preparedness. We'll focus on three key phases—prevention, response, and recovery. You'll learn how to reduce your risk, respond safely in the moment, and support your team in the aftermath. We'll examine common robbery tactics and look at why some locations are more likely to be targeted. Participants will identify behavioral and environmental vulnerabilities that robbers exploit and gain practical strategies to deter crime and handle high-stress situations with confidence. Just as important, we'll cover what happens after the incident. From assisting law enforcement to managing trauma, recovery plays a critical role in restoring safety and trust. This training will help you strengthen your institution's overall readiness and resilience.

HR Tract

Leadership Discipline: Designing and Enforcing Merit-Based Systems

Salon III

Frank Hopkins, Hopkins Leadership

This session reframes merit as a leadership discipline, demonstrating how to design clear performance standards, apply them consistently, and enforce them—especially when it is difficult. Attendees will learn how inconsistent standards undermine accountability, trust, and performance across organizations.

Marketing Tract

The New Bank Marketing Playbook: How Modern Banks are Adapting to Digital, AI, and Customer Engagement

Acadia

Chris Bates, AgoraEversole Marketing Agency

Traditional bank marketing no longer cuts through in today's digital marketing and AI world. In this energizing session, Chris Bates shares a modern framework to help banks stand out by identifying their best-fit customer segments, crafting focused, problem-driven messaging, and building efficient marketing plans that integrate AI and digital marketing tools across multiple channels. Attendees will leave ready to boost search results, grow digital conversions, sharpen differentiation, and build a more resilient, future-ready marketing engine.

AGENDA

THURSDAY AUGUST 20

11:30AM-12:30PM

BREAKOUT SESSIONS
Choose One

Security Tract

Security Assessments: Using CPTED to Make Your Branches Safer — Salon I

Carol Dodgen, Dodgen Security Consulting

Periodic security assessments are vital to identifying weaknesses in facilities, policies, and procedures. This session explores how often assessments should be conducted, what makes locations vulnerable, and how branch design impacts crime risk. Using the principles of Crime Prevention Through Environmental Design (CPTED), attendees will learn practical techniques—including lighting and landscaping strategies—to deter criminal activity and create safer banking environments.

HR Tract

Strategies for Holding Team Members Accountable — Salon III

Jay Toups, High Performance Teams by RMR

Accountability made easy! Holding the team accountable in a way that creates a positive culture is one of the keys to lasting momentum. This session will identify the key ways to create a culture of positive accountability.

Marketing Tract

Stop Selling and Start Connecting — Acadia

Patrick Dix, SHAZAM

It's not enough to be your community's "hometown bank." It's more than telling a potential customer it's "your people" who make the difference. They really don't care how many years you've been in business. It's time to focus on your story. Explore the ways digital media is changing the way we market to consumers, new ways customers are digesting information, and how you can differentiate your message by connecting with customers through storytelling instead of trying to sell to them.

12:30PM-2:00PM

LUNCH WITH SECURITY AWARDS & SPONSOR SPOTLIGHT — Salon II
HR, Security & Marketing

2:00PM-3:00PM

BREAKOUT SESSIONS
Choose One

Security Tract

Update on Mail Theft: Implications for Banks & Customers — Salon I

Billy Kuhn and Jack Wilson, U.S. Postal Inspection Service

The U.S. Postal Inspection Service will provide an update on current mail theft trends affecting checks and financial documents, along with enforcement efforts and practical steps banks can take to reduce fraud risk and protect customers.

HR Tract

When Accommodations Collide: Mental Health Accommodation Requests and the Remote Workplace — Salon III

Stephanie Poucher, Phelps

This session will explore the process, pitfalls, and best practices for accommodating mental health in the workplace, whether through remote work or an emotional support animal. It will also examine complex situations—such as when remote work is not feasible or when another employee is allergic to an accommodated employee's animal. This session will also include time for open discussion of additional scenarios and challenges faced by participants.

AGENDA

THURSDAY AUGUST 20

2:00PM-3:00PM

BREAKOUT SESSIONS (CONTINUED)

Choose One

Marketing Tract

Marketing Execution: Leveraging Traditional and Modern Marketing Channels for Today's Savvy Customers — **Acadia**

Tammy Holtzmeier, Vericast

This session will include learning about the enduring power of direct mail as well as the evolving digital capabilities for banks. Participants will learn how to leverage marketing channels to grow, acquire and attract new customers and new accounts.

3:15PM-4:15PM

BREAKOUT SESSIONS

Choose One

Security Tract

Secret Service Update — **Salon I**

Special Agent Christopher Babin & Special Agent Giovanni Costanza, United States Secret Service, New Orleans Field Office

This session will discuss current trends in financial crimes and ways bank security officers can collaborate with the Secret Service during investigations.

HR Tract

Insurance: The Good, The Bad & The Ugly and Retirement Update: Marketing & Servicing a 401k Plan — **Salon III**

Colin Shea, Gilsbar and Doug Tate, Danielson Tate Capital Partners

This session will cover the insurance trends that are impacting your plans today. We'll look at reasons behind medical trend increases and rising costs. Additionally, we'll discuss success stories of groups that have adapted via alternative risk mechanisms via captives. We'll also have an update on retirement plans. Learn real world insights on serving 401k plans. From the pitfalls of 401k loans to the recurring issues that the team receives on a monthly basis from the 401k participants.

Marketing Tract

Own Your Niche: How Community Banks Can Turn Specialized Programs into Strategic Growth — **Acadia**

Tammy O'shea, Fidelity Bank

In a crowded financial marketplace, community banks can't outspend the competition—but they can out-specialize it. The most successful institutions today are those that identify a unique niche in their market and build meaningful programs around it that deepen relationships, generate loyalty, and drive growth. Attendees will walk away with practical insights on how to identify their bank's own niche, build programs that support real customer needs, and position marketing as a strategic partner in driving growth and differentiation.

4:15PM-5:15PM

BREAKOUT SESSIONS: PEER GROUPS

Choose One

Security Tract

Security Peer Group — **Salon I**

This session will give an opportunity for attendees to discuss with their peers current challenges and best practices in the security area.

HR Tract

Human Resources Peer Group — **Salon III**

This session will give an opportunity for attendees to discuss with their peers current challenges and best practices in the human resources area.

Marketing Tract

Marketing Peer Group — **Acadia**

This session will give an opportunity for attendees to discuss with their peers current challenges and best practices in the marketing area.

AGENDA

FRIDAY AUGUST 21

8:00AM - 9:00AM

CONTINENTAL BREAKFAST

Grand Ballroom Foyer, 2nd Floor

HR, Security & Marketing

9:00AM - 10:00AM

BREAKOUT SESSIONS

Choose One

Security Tract

Occupational Fraud: Has Your Fraud IQ Kept Pace with Your Fraud Risk? — Salon I

Marc Courey, Wipfli

Occupational fraud was estimated to cost U.S. organizations a whopping 5 percent of gross revenue. Moreover, the uncertainty in the economy places increased risk of occupational fraud on your organization from staff by fueling all three components of the fraud triangle: need, opportunity, and rationalization. This session will address the origins of occupational fraud risk, why that risk has increased in the uncertain economy, and ways in which the organization can proactively manage the increased risk.

HR Tract

Labor & Employment Law: Emerging Developments — Salon III

Rachael Jeanfreau, Breazeale, Sachse & Wilson, L.L.P.

This session will highlight what banks need to know about significant recent changes by the Trump Administration, including the reclassification of certain medical marijuana to Schedule III, ongoing updates to wage and hour, and the Administration's continued scrutiny of DEI – and what banks should do to prepare and minimize the risk of claims/charges/lawsuits

Marketing Tract

Mining for Gold: Driving Results with Your Data — Acadia

Tyson Martin, Haberfeld

As the race for core customers, fee income, and expanded customer relationships intensifies, it is imperative to have your financial institution positioned for growth. In the age of analytics and informed decision-making, financial institutions have a largely untapped source of internal data. We know where our current customers live and operate their businesses, and we have access to internal product and service utilization. Given this wealth of information, why aren't more organizations utilizing it to improve results? During this session, we will explore specific and actionable strategies to use internal data to: (1) grow core customers, (2) increase fee income, and (3) deepen customer relationships.

10:15AM-11:15AM

BREAKOUT SESSIONS

Choose One

Security Tract

Investigations & Documentation — Salon I

Garland Prejean, CSE Credit Union

This practical session walks through effective investigation and documentation practices for internal and external financial crimes, covering case types such as internal theft, elder exploitation, account takeover, and forgery. Attendees will learn how to organize investigative files, support SAR filings, and document outcomes effectively.

AGENDA

FRIDAY AUGUST 21

10:15AM-11:15AM

BREAKOUT SESSIONS (CONTINUED)

Choose One

HR Tract

Best Practices Across the Lifecycle of an Employee

Salon III

Jill Ferris, Hub

Your HR technology was supposed to eliminate the manual work, so why are your teams still reconciling data and chasing carrier discrepancies? In this session, HUB International's Jill Ferris delivers a vendor-agnostic framework built for banking HR teams to evaluate, optimize, and finally get more out of the platforms they're already managing, across every stage of the employee lifecycle.

Marketing Tract

Real Communities. Real Results: A Practical Social Media Strategy from a Community Banking Perspective

Acadia

Ann Barilleaux, JD Bank

The best social media content for community banks is often happening every day—you just need to capture it. This session will explore how to turn employee engagement, customer relationships, and community involvement into authentic social media that connects with your audience. Walk away with practical ideas and a repeatable approach to content creation.

11:30AM - 12:30PM

BREAKOUT SESSIONS

Choose One

Security Tract

The Cyber Risk Trifecta: People, Process, and Technology in Bank Security

Salon I

Meeoak Cho, Federal Reserve Bank of Dallas

This session examines emerging cybersecurity threats affecting the banking sector and outlines effective risk management practices across people, process, and technology, including examination focus areas and common findings.

HR Tract

Developing a Talent Pipeline

Salon III

Kelsey Breeze, SHAZAM

Financial institutions across the country are struggling to recruit and retain talent. Are you looking for an established pipeline of entry-level candidates? Can recruiting solutions be found internally, allowing you to test-drive the talent your organization needs? In this session participants will learn how to develop talent partnerships and create a program that mutually benefits their company and community.

Marketing Tract

Your Biggest Competitor Already Uses AI: Here’s What They Know That You Don’t

Acadia

Charles LeFevre, Kadince

The biggest banks in the country have used AI to target and personalize their marketing for over a decade. Your community bank is competing against that right now, whether you realize it or not. This session gives you seven AI tactics you can implement immediately, shows you why most banks are managing AI risk the wrong way, and teaches you the "human-in-the-loop" framework that lets marketing move faster while keeping compliance and security in control.

LOCATION & ACCOMODATIONS

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

Group Room Block Information:
For Reservations:

- [Click here to book online reservations]
  Or
- Call (800) 826-8987 (Mention Louisiana Bankers Association HR, Security & Marketing Conference)

King Bed Rooms and Deluxe Double Bed Rooms are available, each at the rate of $215+tax per night.

The LBA has contracted for a set number of sleeping rooms at The Ritz-Carlton, New Orleans 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 receive the LBA's discounted rate of $215.00+ tax. The deadline for the room block is August 4, 2026. After that date, reservations will be made based on availability and the hotel may not be able to honor the discounted rate.

CONFERENCE SPONSORS

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Bankers benefits OF LOUISIANA

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2026 HUMAN RESOURCES, SECURITY & MARKETING CONFERENCE

REGISTRATION INFORMATION

Mr./Mrs./Ms --

Bank --

Email Address --

Branch Street Address --

City, State, Zip --

Office Phone: --

Cell Phone: --

PAYMENT OPTIONS

☐ Check (Made payable to the Louisiana Bankers Association)

☐ Visa ☐ MasterCard ☐ American Express

Card # ________________________________

Expiration Date ________________________________

Name on Card (Please Print) ________________________________

Billing Address________________________________

Signature ________________________________

Amount to be Charged on Card $________________

Registration Fees:
$475, per LBA Member
$675, per Non-Member

CANCELLATION POLICY

Due to commitments we must make to secure a class, we need your help. If you must cancel your registration, please do so by August 14 to avoid a $175 cancellation fee. Any registrant who does not cancel will be billed the full registration fee. Substitutions are welcome at no additional charge.

Submit registration and view roster in the Education Section of LBA's Website, www.lba.org

LouisianaBankers ASSOCIATION

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