



# 2026 Principles of Banking

## 9-Week Virtual Course/Live Instructor-Led

For over 40 years, the American Bankers Association's Principles of Banking course has been respected as the most comprehensive introduction to the banking industry. Thorough, easily digestible, and detailed, this textbook and live, instructor-led course provides an overall understanding of the financial services industry. The Louisiana Bankers Association is pleased to once again offer the Principles of Banking course in a weekly virtual format.



### Course Dates & Agenda

*All sessions held from 9am-11am unless otherwise noted*

- **Friday September 18** - Orientation via Zoom - 9am-10am
- **Tuesday September 22** - Chapter 1: Banks as Service Providers
- **Friday October 2** - Chapter 2: Banks as Businesses
- **Friday October 9** - Chapter 3: Deposit Accounts
- **Friday October 16** - Chapter 4: Payments: Cash & Checks, Chapter 5: Electronic Banking & Midterm Review
- **Midterm Exam** to be completed on Chapters 1-5. (Midterm Exam posted on 10/16 and will allow up to 1 week for completion)
- **Tuesday October 20** - Chapter 6: Lending
- **Friday October 30** - Chapter 7: Personal Financial Planning
- **Friday November 6** - Chapter 8: Business & International Banking
- **Friday November 13** - Chapter 9: Building Relationships: Marketing, Sales & Customer Service
- **Friday November 20** - Chapter 10: Safeguarding Customers & the Bank and Final Exam Review
- **Final Exam** to be completed on Chapters 6-10 (Final Exam posted on 11/20 and will allow up to 1 week for completion)

### Registration Fee & Registration Deadline

- \$495 - LBA Member Fee (Includes Printed 12<sup>th</sup> Edition Textbook)
- \$895 - Non-Member Fee (Includes Printed 12<sup>th</sup> Edition Textbook)

For our planning purposes, please register by September 9, 2026.

# Program Overview & Highlights

This course provides an overview of fundamental banking concepts and principles in a convenient remote environment. Some of the topics covered will include:

- Overview of banking functions, competitors and future trends
- Review of banking history including legislation, regulations and regulatory agencies
- Breakdown of bank financials – income statement, balance sheet and bank performance metrics
- Products and services – deposits, loans, financial planning, trust services and business banking
- Digital banking – payment systems, online banking, mobile banking and remote capture
- Enhancing customer relationships – bank involvement in the community, importance of cross-selling and relationship building as well as exceeding customer expectations
- The safeguarding of banks, their employees and their customers – fraud, corporate governance, privacy and cybersecurity risks

## Course Format & Technical Requirements

Principles of Banking will be delivered via Zoom. The course will also use a community dashboard where instructors and participants can post in between classes. Each session, participants will log into a 2-hour live Zoom session. These sessions are instructor-led by seasoned bankers and may also include guest speakers. Participants will be able to see the instructors.

**It is recommended that participants use their webcam. Participants must have the ability to speak (either using a computer microphone or dialed in by phone).**

Prior to the course start date, participants will receive a 12th edition ABA Principles of Banking textbook.

- Shipment of the textbook will occur closer to the start date of the class (within a week or two prior to the start date).
- Participants will be expected to read each assigned chapter prior to the next week's class.
- The midterm and final exams will be completed electronically in the community and participants will have up to 1 week to complete.

## Who Should Attend

Principles of Banking has direct applicability to a broad range of banking positions. This course will benefit:

- New bankers needing a broad knowledge of the banking industry
- Emerging bankers desiring a general understanding of the financial services industry
- Seasoned bankers seeking to gain a broader understanding of the banking industry
- Bank attorneys looking for an overview of the banking industry
- Any banker who would benefit from an understanding of the changing world of financial services

## Course Cancellation Policy

The price of this program is inclusive of all 9 sessions. If you must cancel your registration, please do so by September 9, 2026 to avoid a \$250 cancellation fee. Once the course begins, substitutions will not be allowed.

# Course Instructors



**Jake Guidry** is a Sr. Vice President / Commercial Lending Market Manager for Fidelity Bank. In 2023, Jake was selected to serve on the prestigious American Bankers Association's Emerging Leaders Council. In 2021, Jake was selected as one of five statewide recipients of the first ever Louisiana Bankers Association's Louisiana Young Banker Impact Award, a statewide award which recognizes bankers less than 45 years of age who have made significant contributions to their bank and/or the banking industry over their career. Jake's banking experience expands over 19 years as he started in banking in early 2006 as a part-time teller for St. Martin Bank & Trust Co (now Home Bank). Following graduation from the University of Louisiana at Lafayette in 2009, Jake's career began to blossom at St. Martin Bank as he was selected as one of the few management trainees in the bank's 80+ year history. Jake joined b1BANK in early 2015 as an Assistant Vice President, Commercial Banker. Jake was promoted to Vice President in 2018 and Sr. Vice President in 2021. In 2017, the CEO of b1Bank tasked Jake with the responsibility with assisting the Bank in the development of a scholarship program for employees of the b1Bank and their children. During Jake's tenure, the scholarship program awarded over \$100,000 in scholarship proceeds. Jake is a former graduate of the Graduate School at Banking at LSU where he helped lead his team to the top overall bank in BankSim. Jake was also a recipient of the Louisiana Bankers Association's Graduate School of Banking Scholarship. Jake is Past President of the Louisiana Bankers Education Council where he served on the board for over 8+ years. While serving on the board Jake also served on a subcommittee that developed and implemented the "365 to Rich" Bank Shadow Day program at the LBA. A Bank Shadow Day program that is now offered at many banks across the state of Louisiana. Jake also graduated from Leadership Institute of Acadiana's Leadership Lafayette program in 2020. Jake's other accolades and civic contributions include, LBA's Leadership School Graduate (inaugural class), ABA's Commercial Lending School graduate, present volunteer for Junior Achievement, former board member for Downtown Lafayette Unlimited (DLU), Banking on the Leaders of Tomorrow alumni (BOLT - US Federal Reserve), served as an Ambassador for One Acadiana, member of the 705 Club of Lafayette (Young Leaders Organization), member of the Acadian Home Builder Association, member of the Leadership Institute of Acadiana, and is a Louisiana Notary Public with statewide jurisdiction. Jake and his wife Brittany reside in Lafayette and have two children, Charlotte and Beau.



**Michael Wilson** has over two decades of banking experience providing a broad range of financial and operational skills creating a strong foundation in banking principals. Michael holds a Bachelor of Business Administration - Accounting degree and has completed the Graduate School of Banking at LSU and Louisiana Banker's Education Council's Leadership School along with numerous schools covering banking, lending, and compliance topics. Starting his career with Magnolia Federal Savings Bank's Management Trainee program as a teller and advancing to his current position of President of a multi-bank holding company, Caldwell Holding Company, he has had a multitude of opportunities to mentor bankers by providing an understanding of sound, professional banking concepts in a relatable manner. Over his career, he has managed through and developed new procedures to keep pace with the significant changes in the banking industry and believes a strong base in banking principals provides an important foundation for all bankers to advance.

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## REGISTRATION INFORMATION

Mr./Mrs./Ms \_\_\_\_\_

Bank \_\_\_\_\_

Email Address \_\_\_\_\_

Branch Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Office Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Supervisor's Name \_\_\_\_\_

Supervisor's Email Address \_\_\_\_\_

Supervisor's 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:

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QR CODE  
WEBSITE  
HERE!

Submit registration and view roster in the Education Section of LBA's Website, [www.lba.org](http://www.lba.org)

