



# Executive Management Conference

September 13-15, 2017

The Grand Hotel - Point Clear, Alabama

## Wednesday, September 13, 2017

3:00pm Registration Begins, *Grand Ballroom Foyer*

6:00pm-8:00pm Opening Reception, *Grand Ballroom Patio*  
*Sponsored by Louisiana Bankers Service Corporation*

## Thursday, September 14, 2017

7:30am-8:30am Breakfast featuring Sponsor Spotlight - *Grand Ballroom South*

8:30am-9:30am Current Issues Facing Financial Institutions - Thomas Hutton and Ben Azoff, Luse Gorman - *Magnolia 4 Ballroom*

The presentation focuses on current issues facing financial institutions today, including (i) Bank Secrecy Act/Anti-Money Laundering, (ii) Consumer Compliance, (iii) Data Security, (iv) Enterprise Risk Management, (v) Vendor Management, (vi) Corporate Governance and (vii) Emerging Supervisory Issues.

9:45am-10:45am *Concurrent Sessions: Please Choose One:*

**Concurrent Session 1: Credit Trends in Louisiana and the US - Richard Heath, Equifax Technology & Analytics Consulting - *Magnolia 4 Ballroom***

This session will compare consumer credit trends in Louisiana with those in the overall US, covering balance growth, delinquency, and general credit quality across the major loan product categories.

**Concurrent Session 2: Retail 2020: Time for Disruptive Transformation - Kevin Blair, NewGround - *Beachside Room***

Experts around the world agree that financial services retail environments will undergo more change in the upcoming decade than the industry has experienced in the last century. Market consolidation, technology integration, virtualization of the consumer experience and uncertainty on the role of the branch will stretch managerial competencies beyond their comfort zones. Today's retail strategies and environments must transform to meet the evolving demands of consumers. In this presentation you will learn how the top performing organizations are repositioning themselves to meet the shifting demands of consumers and are thriving in the midst of the market uncertainty. Program Highlights: (1) Understand key market drivers; (2) Top industry retail distribution trends; (3) Case studies of top industry performers implementing transformational change

10:30am-1:00pm *Guest Program: Cooking Class & Lunch - See Page 4 for more information*

11:00am-12:00pm *Concurrent Sessions: Please Choose One:*

**Concurrent Session 1: Bank Cybersecurity from a Management Perspective - Alex Hernandez, DefenseStorm - *Magnolia 4 Ballroom***

Long gone are the days when community bank executives would face a technology issue and put the onus in the hands of their IT department and simply move on. Technology is no longer just an IT issue — it's a CEO, senior management, and board issue. The top leaders in any organization must stay informed and play a critical role in how their bank handles technology matters; even more so when it comes to the organization's IT security. Knowing that this level of leadership is a must, but also recognizing that most community bank executives do not have a technical background, this session will identify practical steps Senior Management must take in order to keep their bank secure in today's challenging world of IT security.



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## Thursday, September 14, 2017 (continued)

11:00am-12:00pm

Concurrent Sessions (continued):

**Concurrent Session 2: How to Double Your Bank's Success Rate for Mission-Critical Initiatives** - Michael Beduze, Da Vinci Global Consulting, LLC and Ed Miltenberger, Carrier & Affinity Group Strategies - *Beachside Room*

According to a study by the Project Management Institute, only 4 in 10 mission-critical projects are successful. What would it mean to your organization if you could double your success rate for projects vital to your organization's future. Come learn about the management science of "**Organizational Alignment (OA)**:" how to go from '*we each think*' to '*we all agree*' in one-third the time, with 70% less hassle while maximizing the full potential of your organization. See 'OA' in action as we take you into a case study on business succession planning done the right way.

12:00pm

Sessions Adjourn

1:00pm-5:00pm

**Golf Scramble** - See Page 4 for more information

*\*Box lunches will be provided prior to start, beginning at 12pm in the Lakewood Club House.*

1:00pm-5:00pm

**Charter Fishing Trips** - See Page 4 for more information

*\*Box lunches will be provided prior to start, beginning at 12pm at the Marina at the Grand Hotel.*

Evening on Your Own

## Friday, September 15, 2017

7:30am-8:30am

**Breakfast with Sponsor Spotlight and Office of Financial Institutions Update** - John Ducrest, Commissioner - *Grand Ballroom South*

8:30am-9:30am

Concurrent Sessions: Please Choose One:

**Concurrent Session 1: The New CDD Rule: A Brief History and a Glimpse Into the Future** - Carey Rome and Lisa Beck, autoAML - *Magnolia 4 Ballroom*

The "New" customer due diligence (CDD) rule came out May 11, 2016. The intent was to clarify and strengthen CDD requirements. Many financial institutions are viewing this as a non-event. Others see this as the most significant change impacting BSA/AML since the Patriot Act. So who's right? This session will add clarity and context around exactly what will be expected and how you can prepare.

**Concurrent Session 2: Team Mission, Vision, Values** - Devin Lemoine, Success Labs - *Beachside Room*

Mission, Vision, Values: these organizational development cornerstones are more than just a corporate statement. When properly integrated, your company's Mission, Vision, and Values means something to employees and customers. Through this workshop, discover ways to solidify and align your Mission, Vision and Values to reflect your organization's strategic goals, value proposition, and the way business is conducted inside and outside company walls. Workshop includes a simple approach to start defining your company values, mission and a shared vision for the future to ensure a successful company.

9:45am-10:45am

Concurrent Sessions: Please Choose One:

**Concurrent Session 1: Discover Debit Program** - Mark Reda, PULSE, a Discover Company *Magnolia 4 Ballroom*

Discover Debit is the first debit card brand designed for banks just like yours who want the freedom and choice to issue cards without the high costs and restrictions imposed by competitors. Find out how our simple and cost-effective approach can empower you to be more profitable, and our personalized care makes switching easy, so you can focus on what's most important - your cardholders.



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## Friday, September 15, 2017 (continued)

9:45am-10:45am

Concurrent Sessions (continued):

**Concurrent Session 2: Being Strategic with your Compensation Programs - Ken Derks, Equias Alliance and Michael Blanchard, Blanchard Consulting Group - Beachside Room**

Bankers continue to be concerned about losing top talent to competing organizations. This session will provide an overview of bank compensation strategies and practices used by community banks. Retaining top talent is critical to profitability and revenue enhancement. We will discuss strategies to align both short and long term profitability goals with compensation strategies. Topics include: salary administration issues; annual incentives plan trends, regulations and guidelines; producer and support staff incentive plans; linking incentives to long term performance; overview of the five key elements of compensation; overview of nonqualified benefit plans.

11:00am-12:00pm

**Steady As She Goes: Investment Strategies for 2017 - Dan Stimpson, Vining Sparks - Magnolia 4 Ballroom**

The Federal Reserve has pledged to keep monetary policy ahead of inflation. How will the newly reconstituted FOMC's comments, and actions, conform to market expectations? Investment strategies and products that take advantage of such probabilities will be discussed. We will also examine the Fed's possible outcomes for shrinking its record balance sheet, and the implications for a community bank investment portfolio.

12:00pm

**Conference Adjourns**

## Location & Hotel Information

The Grand Hotel, Point Clear, Alabama  
One Grand Boulevard  
Point Clear, Alabama 36564  
(251) 928-9201



### Hotel Reservations at The Grand Hotel

The LBA has contracted for a set number of sleeping rooms at The Grand Hotel 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 ensure the LBA group rate of \$199.00+ tax, please call (800) 228-9290 or (251) 928-9201 and identify that you're booking with the Louisiana Bankers Association

Executive Management Conference room block. Reservations can also be made online by [clicking here](#).

*\*For reservations pre and post conference dates (Tuesday 9/12, Friday 9/15 and Saturday 9/16), it is recommended that you call for reservations to ensure the group rate.*

Sleeping room reservations must be made by **August 23, 2017** at 5:00pm or until the block of rooms for LBA is filled, whichever is sooner. After August 23, 2017, reservations will be made based on availability and the hotel may not be able to honor the discounted rate. Check in time is 4pm. Check out time is 11am.



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## Conference Activities

### ***Guest Program: Cooking Class & Lunch***

*Thursday, September 14, 2017*

*10:30am-1:00pm*

*\$75 per person*

*A Grand Hotel Chef will conduct a fun and educational cooking class. When that's done, you will actually get to eat the finished product. You will receive an educational cooking class, lunch, recipes, a Grand Hotel Cooking Academy Diploma - not to mention a great time!*



### ***Golf Scramble at Lakewood Golf Club***

*Thursday, September 14, 2017*

*1:00pm-5:00pm*

*\$135 per person\**

*\* Cost 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 12pm in the Lakewood Club House.*



### ***Charter Fishing Trips - Inshore Saltwater Fishing***

*Thursday, September 14, 2017*

*1:00pm- 5:00pm*

*\$150 per person\**

*\* Cost includes a fishing license, box lunch and beverages on the boat.*

*\* This is a "catch and release" fishing trip; however, if you want to take the fish you catch home, you are welcome to do so if you bring your own cooler.*

*\* Limited seats available. Please register early.*

*Join experienced and licensed guides that will take you fishing for speckled trout, redfish, flounder, and more within minutes of leaving the dock. Tackle, bait, license, and instruction are included. Come prepared to have fun!*

*\*Box lunches will be provided prior to the start, beginning at 12pm at the Marina of the hotel near the boat slips (between the Marina House and the Spa Building).*





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## Registration Information: (for multiple registrations, please make copies of this form)

Name \_\_\_\_\_  
 Bank \_\_\_\_\_  
 Branch Street Address \_\_\_\_\_  
 City / State/ Zip \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_ Fax \_\_\_\_\_

## Conference Fees:

- Banker Program: *\$375 LBA member, \$675 non-member* \$ \_\_\_\_\_
  - Spouse/Guest: *\$125* - Name: \_\_\_\_\_ \$ \_\_\_\_\_
  - Golf Scramble: Thursday, September 15 - *\$135 per person*
    - Name: \_\_\_\_\_ \$ \_\_\_\_\_
    - Pairing Request: \_\_\_\_\_
    - Name: \_\_\_\_\_ \$ \_\_\_\_\_
    - Pairing Request: \_\_\_\_\_
  - Guest Program: Cooking Class & Lunch - Thursday, September 15 - *\$75 per person* \$ \_\_\_\_\_
    - Name: \_\_\_\_\_
  - Charter Fishing Trip - Thursday, September 15 - *\$150 per person* \$ \_\_\_\_\_
    - Name: \_\_\_\_\_ Name: \_\_\_\_\_
    - Name: \_\_\_\_\_ Name: \_\_\_\_\_
    - Name: \_\_\_\_\_ Name: \_\_\_\_\_
- 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 6, 2017 to avoid a \$175 cancellation fee. Substitutions are welcome at no additional charge.

Guest Program: Cooking Class & Lunch - Please cancel by September 6, 2017 to avoid a \$35 cancellation fee.

Golf - Please cancel by September 6, 2017 to avoid a \$65 cancellation fee.

Fishing - Please cancel by September 6, 2017 to avoid a \$65 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, <http://www.lba.org>

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