

2024 LOAN OPERATIONS MANAGER FORUM

**IBA Center for
Professional Development**

8425 Woodfield Crossing Blvd., Suite 155E
Indianapolis, IN 46240

March 20, 2024 • August 15, 2024 • December 12, 2024

An Investment in Your Bank's Future!

The Forums provide an opportunity for community bank loan operations professionals to exchange ideas freely, dissect problems and discuss important issues with their peers. For most banks, the investment in technology to support the lending function continues to expand and become more complex. The Loan Operations Manager Forums are designed to help deal with the technical side, as well as to be a rewarding experience where members can grow professionally and personally.

Benefits of the Forum

- Improve the efficiency of loan support processes, whether automated or manual
- Reduce the risk in your loan portfolio from an operational and transactional perspective
- Optimize staffing levels to handle loan production
- Increase your understanding of regulatory and compliance requirements
- Form lasting relationships with noncompeting loan operations managers
- Get solutions and practical ideas for your most pressing concerns
- Grow professionally as well as personally
- Discuss with peers what works and what doesn't

Who Should Attend?

The IBA is pleased to provide the Senior Lender Forum for community bank senior lenders, chief lending officers and/or chief credit officers to exchange ideas freely, dissect problems and discuss important issues with peers.

Possible Forum Topics

- Practical tips for consistent file naming or cataloging in the imaging of documents
- Benefits and advantages/disadvantages of automated document preparation software
- Effective ways to cross-train loan support employees
- What positions within loan operations are conducive to remote or hybrid work?
- Hiring, recruitment, and retention strategies that work
- New technology solutions
- Concerns or issues raised in recent regulatory examinations
- More people issues: managing vs. micro-managing
- Providing reports to upper management
- Ideas for loan support activities that can be automated
- Emerging best practices in post-closing reviews and similar checklists for insurance tracking and collection of financial information from customers
- Handling of lien documents, including UCC filings and mortgage recordings
- Efficient administration of construction loans and the draw process
- Loan operations structure
- Best practices in many different areas, from flow, to training.
- Exam/audit preparation best practices.
- Specific areas to cover, such as bankruptcy, charge offs, etc.



Facilitator: Richard Hamm

Richard Hamm with Advantage Consulting & Training has been training bankers for over 30 years, designing and delivering courses specializing in commercial lending and credit, including portfolio and risk management, commercial real estate (CRE) and appraisals, plus selling and negotiating skills, and director training. His clients include national associations such as The Risk Management Association (RMA); regional banking schools such as the Barret School of Banking – Memphis, the Graduate School of Banking – Wisconsin, the Southwestern Graduate School of Banking – Dallas, the Graduate School of Banking at Colorado, and the Western States School of Banking; state banking and community banking associations in a dozen states; and individual banks.

Based in Huntsville, AL, he has owned/operated Advantage Consulting & Training for over 15 years, after a 22-year banking career including senior positions in lending and credit, plus president of a community bank through formation, then acquisition of an existing bank. He has BS and MBA degrees from the University of Alabama, Tuscaloosa.

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REGISTRATION

How the Forum Works

- IBA will organize the forum based on bank size and market to ensure that participants have as much in common as possible
- The group will be small - usually no more than 20 participants.
- Eight to ten topics will be discussed at each session; participants are strongly encouraged to suggest agenda topics of interest.
- Forum participants get the benefit of working with expert consultants on a cost-saving basis.
- Forum participants get the benefit of networking and making brief queries within their groups between meetings.
- Comprehensive handout compiled and provided to each group member, along with a binder for retention of handouts, notes and references.

Registration Fee for All Three Sessions:

The following fees include the program materials, continental breakfast, lunch and refreshments.

\$999 per IBA member

A surcharge of 100% will be applied for non-members.

Participation in IBA programs is limited to members, associate members and non-members from an eligible membership category at applicable member or non-member rates.

2024 Loan Operations Manager Forum

3 Session Registration

Please type or print legibly.

Bank Name _____

Attendee Name _____

Email Address _____

Additional Attendee Name _____

Email Address _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Cell # (in case of weather emergency) _____

Payment Information

Credit Card Information (check one):

MasterCard VISA AMEX Invoice Me

Total Amount Due \$ _____

Cardholder Name _____

CVV Code _____

Card Number _____

Exp. Date _____

Cancellation Policy:

Due to our commitments, the price is inclusive of all three sessions. A full refund for the three-session forum will be given for cancellations received prior to the first session. Any registrant who does not cancel before the first session will be billed the full registration fee and sent the materials. Substitutions are welcome at no additional charge.



Register online at indiana.bank!