



Indiana Bankers Association Chief Financial Officer Forum

An Investment in Your Bank's Future!

This CFO Forum will provide a platform and opportunity for Chief Financial Officers and controllers to exchange ideas freely, dissect problems and discuss important issues with peers. You do not want to miss this opportunity!

**Location: IBA Center for Professional Development
8425 Woodfield Crossing Blvd, Suite 155E, Indianapolis, IN 46240**

February 7, 2019 • June 20, 2019 • October 17, 2019 (Group 1)

February 8, 2019 • June 21, 2019 • October 18, 2019 (Group 2)



Benefits of the Forum...

- Improve your effectiveness as CFO/Controller
- Learn what's working and what's not in bank financial management
- Improve the efficiency of your bank's financial function
- Form lasting relationships with other CFOs
- Solve your most pressing concerns
- Obtain access to highly respected industry experts
- Grow professionally as well as personally
- Discuss with peers what works and what doesn't

Possible Forum Topics

- Accounting issues - Evolution of the ALLL toward the Current Expected Credit Loss model; FASB guidance on liquidity and interest rate risk disclosures
- ALCO issues - Getting the most from your model and your advisor; Board understanding of ALCO issues; Surviving the low rate environment, enhancing your investment portfolio, non—core funding techniques.
- Bank profitability issues - Squeezing every basis point; Leading indicators of profitability versus lagging indicators; Customer profitability measurement, loan pricing, modals, fee income generation.
- Regulatory issues - Increasing emphasis on enterprise risk management; Stress testing the capital plan; Assessing third party vendor risk, Contingency Funding Plan evaluation
- Financial reporting issues - The CFO as Chief Measurement Officer; Reports that change behavior; Planning/budgeting issues; Improvements in Board reporting, IPAOS and Dashboard.
- Personal growth - Making execution a priority; The CFO as a leader; Retention and motivation of financial function personnel
- Emerging issues - The CFO and cybersecurity; Analyzing technology investments and their risks; Succession planning for CFOs.

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—no more than 15 participants.
- The Forum will meet three times during the year
- Eight to 10 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
- A binder based on Forum topics is compiled for each group member



Presenter: Karl Nelson

Karl Nelson, president and CEO of KPN Consulting will lead the Forum discussion. Nelson served as a senior vice president with the Federal Home Loan Bank of Atlanta from 1991 through 2002 where he managed the sales and marketing, strategic planning, and trade association/regulatory outreach efforts and served on the bank’s ALCO. Prior to joining the FHLB, he was involved for 18 years with various regional banks. Nelson serves on the faculties of the Graduate School of Banking in Madison, WI and Boulder, CO, the Graduate School of Banking Investments & Financial Management in Columbia, SC, the Financial Managers School in Madison, the Asian Banking Academy, as well as the faculties of many of the state banking schools. Nelson is an organizing director and ALCO chairman for a de novo bank in North Carolina and consults regularly with community bank boards and management on business strategies.

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Registration Fee for All Three Sessions:

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

\$1,200 per IBA member \$2,400 per non-member

Please return this forum to: IBA Center for Professional Development, 8425 Woodfield Crossing Blvd, Suite 155E, Indianapolis, IN 46240

Name _____ E-mail Address _____

Bank _____

Address _____

City/State/Zip _____

Phone _____ Cell _____

Confirmation / Cancellation Policy

Due to our commitments, the price is inclusive of all three sessions. A full refund for the 3-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.

Agenda

- 8:30 a.m. Registration
- 9:00 a.m. Program Begins
- Noon Lunch
- 3:00 p.m. Program Adjourns

For More Information

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