

Directors Symposium

Dept. 33



REGISTRATION FEES

IBA Members
\$295 per person
\$895 per bank - unlimited attendees from the same institution
\$895 - On-Demand Recording

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Registration

Attendee Name

Bank

Email

Address

City, State, Zip

Phone

Additional Attendee

Additional Attendee

Additional Attendee

Payment Information

Please circle one:

VISA

MasterCard

AMEX

Total Amount Enclosed \$

Card Holder Name

Credit Card Number

Expiration Date

CVV

Who Should Attend?

The 2025 Bank Directors' Symposium is a must attend for all Directors and CEOs with a special focus on the banking industry's current and future outlook. The objective of this symposium is to provide updates on topics including regulatory expectations, vendor management, succession planning, talent acquisition, ALCO and other critical areas for a bank's success.

indiana.bank/education

Virtual Bank Directors Symposium

August 7, 2025

9:00 am - 3:00 pm EST



INDIANA BANKERS ASSOCIATION

PROGRAM OVERVIEW

This workshop will explore the role played by the Board of high performing banks. High performing banks are defined as producing strong returns for their shareholders. These effective boards are characterized by being active, but not meddling. These boards allow management to run the bank on a day-to-day basis, while holding management accountable. The bank’s best opportunity for success occurs when the board clearly sets the strategic direction of the bank.

SPEAKERS

Josh McNulty, Partner, Hunton Andrews Kurth

Josh’s practice primarily focuses on regulatory compliance, mergers and acquisitions, and securities law matters for financial institutions. Josh’s practice focuses on corporate governance, mergers and acquisitions, securities, and regulatory representation for state and national banks, holding companies, and other financial institutions. Josh counsels state and national banks, holding companies and other financial institutions on state and federal regulatory compliance issues, including all aspects of regulatory matters involving the Federal Deposit Insurance Corporation, the Federal Reserve, the Office of the Comptroller of the Currency, the Texas Department of Banking and the Consumer Financial Protection Bureau. He also advises clients on corporate governance, stockholder matters, shareholder agreements, fiduciary obligations and a broad range of public and private capital market transactions, including initial public offerings and private placements.

Anne Schutt, VP of Business Development, Midwestern Trading Securities Company

As Vice President of Business Development, Anne Schutt’s focus is on building new relationships with community financial institutions who are looking to grow. She makes use of our strategic partnerships with financial associations to form connections with bank and credit union leadership and understand the challenges they face in today’s competitive environment. Anne brings to her position a wealth of experience and expertise in sales, training, and leadership across multiple industries, including healthcare and finance. Her commitment to fostering strong client relationships and driving business growth aligns perfectly with our mission to provide unparalleled services to our valued partners.

Charlie Kelly, Partner, Remedy Consulting

Charlie Kelly is a Partner at Remedy Consulting. Remedy Consulting advises community financial institutions (FIs) on Technology Contract Negotiation, Technology System Assessments & Project Management Services, Technology Contract Terms & Conditions Improvements, and Technology Strategy. Charlie hosts a thought leadership podcast for bank and credit union executives called BankTalk which is the most downloaded podcast in the Community FI space.

Dale Sheller, Managing Director – The Baker Group

Dale Sheller is an Managing Director and the Director of Financial Strategies Group at The Baker Group. He joined the firm in 2015 after spending six years as a bank examiner with the Federal Deposit Insurance Corporation. Sheller holds a bachelor’s degree in finance and a master’s degree in business administration from Oklahoma State University. He works with clients on investment portfolio strategies, interest rate risk management, liquidity risk management, and regulatory issues. Sheller regularly speaks at educational seminars nationwide and serves as a faculty member for multiple banking schools including the Southwest Graduate School of Banking at Southern Methodist University in Dallas.

David Ruffin, Principle, Intellicredit, a QwickRate company

David’s extensive experience in the financial industry includes a long and pronounced emphasis on credit risk in a variety of roles that range from bank lender and senior credit officer to co-founder of the successful Credit Risk Management, LLC consultancy and professor at several banking schools. A prolific publisher of credit-focused articles, he is a frequent speaker at trade association forums, where he shares insights gained helping lending institutions evaluate credit risk—in both its traditional, transactional form as well as the risk associated with portfolios based on a more emergent macro strategy. David is an expert in assessing all aspects of the credit process and culture. Over the course of decades, he has led teams providing thousands of loan reviews and performed hundreds of due diligence engagements focused on M&A and capital raising. Most recently he headed the DHG-Credit Risk Management division at the Dixon Hughes Goodman accounting firm.

SCHEDULE

9:00 – 9:30 am

Welcome and Opening Remarks
Karl Nelson, Founder & CEO, KPN Consulting

9:35 – 10:30 am

Regulatory Hot Topics 2025 & Beyond
Josh McNulty, Partner, Hunton Andrews Kurth
Gain an overview of the bank regulatory and supervisory highlights and some predictions on what might be in store for 2025. Topics that will be covered include the top 10 list of hot topics the regulators have identified as priorities in 2025 and through their annual risk guidance, which include supervision, compliance, governance and risk management.

10:35 – 11:30 am

Building a Culture that Fosters Curiosity
Anne Schutt, VP of Business Development, Midwestern Trading Securities Company
Eleanor Roosevelt famously said, “Life must be lived, and curiosity kept alive. One must never, for whatever reason, turn his back on life.” Why is curiosity so important in the workplace? In a Harvard Business Review of 3000 employees, 92% felt that curiosity was a catalyst for job satisfaction, motivation, innovation, and high performance, yet only 24% felt curious at work. In this session, we will help you learn to identify and remove barriers you may have in place that are preventing a curiosity culture so that you can retain and attract talent to your organization.

11:35 – 12:30 pm

As a Bank Leader, Understand How to Get More Out of Your Technology Vendors
Charlie Kelly, Partner, Remedy Consulting

Bank leaders are constantly looking for ways to improve your business performance, customer satisfaction, and regulatory compliance. One of the key factors that can help you achieve these goals is your technology vendors. Technology vendors provide you with the software, hardware, and services that enable your bank to operate efficiently, securely, and innovatively. However, not all vendors are created equal, and not all vendor relationships are optimal. In this presentation, we will discuss how you can get more out of your technology vendors by understanding the landscape and following some best practices for vendor selection, management, and evaluation.

12:30 – 1:00 pm

Break for Lunch

1:05 – 2:00 pm

Asset/Liability Management in Today’s Environment
Dale Sheller, Managing Director – The Baker Group
Nearly three years ago, the Federal Reserve embarked on an aggressive tightening cycle to rein in inflation following the global pandemic. As we start 2025, the economy and the banking industry face renewed uncertainties, fueled by the recent election and more anticipated rate cuts by the Fed during the year. Senior management continues to navigate an environment marked by elevated interest rates and the looming threat of an economic downturn. This session will examine and discuss all these concerns and present strategies to better prepare your institution for the uncertainty ahead.

2:05 – 3:00 pm

The Board’s Role in Overseeing Credit Risk
David Ruffin, Principle, Intellicredit, a QwickRate company

This session will explore the complementary but distinct roles of the board and management and practical suggestions on how those roles can be successfully managed. Regulatory expectations will be addressed as well as meeting fiduciary duties and strategic imperatives. We will also discuss stress testing limits and techniques and strategies to manage and control CRE and other asset-liability concentrations will be emphasized.

3:00 pm

Concluding Remarks and Adjourn
Karl Nelson, Founder & CEO, KPN Consulting

CONTACT

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