

Business Operations & Management

(Dept. 110)

Please type or print legibly.

Copy this form for additional participants.

Name

Nickname for Badge

Bank/Firm

Address

City/State/Zip

Phone

Fax

Emergency # (In case of bad weather, etc.)

E-Mail

Fees

\$225 IBA Member

Participation in IBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or non-member rates. Surcharge of 100% for Non-Members.

Payment Information

Total payable to the IBA Foundation, Inc.

Check Enclosed VISA MasterCard AMEX

Account Number

Exp. Date

Dress is Business Casual

Register online: www.indianabankers.org

Return this form to:

IBA Foundation Inc.

8425 Woodfield Place Suite 155E

Indianapolis, IN 46240

317-387-9380 Fax: 317-333-7162

Fees & Location

The "Essentials of Banking" is priced for maximum flexibility. The bank receives a significant discount by registering for the entire series. The bank may send the same person or a different individual for each session. Furthermore, the bank's registrant may attend any of the sessions as a single seminar. The following fees include the program, and training materials:

IBA Members Individual Session

\$225

IBA Members 4-Part Series

\$850

Surcharge of 100% for Non-Members.

This training will be held on Thursday, June 18th online! You will receive your manual 2-3 days in advance should you want to print this to have during training. At this time, you will also receive log in instructions.

Special Accommodations

The IBA is committed to providing the best education in the best facility possible. To that end, we strive to accommodate any special needs bankers may have while attending our programs. If you need special accommodations or have dietary restrictions, please let us know.

Confirmation / Cancellation

The IBA will send confirmations as requested for its programs. Please check the appropriate box & include a fax number on the registration form. If you have questions, contact Marcy Borden at 317-387-9380 or via email at mborden@indianabankers.org.

Within three or more business days prior to the day of an educational program, no cancellation charge will be assessed. Within two days prior, 50% of the fee is assessed. Refunds are not provided for cancellations or absences on the day of the program. Substitutions are welcome at anytime.



LIVE VIRTUAL TRAINING

Business Operations & Management

This seminar is part of a four-part series (or four one-day seminars), designed to provide a complete knowledge of banking principles and operations.

*Thursday
June 18, 2020*



Register online: www.indianabankers.org

Program Overview

The Indiana Bankers Association (IBA) is pleased to present “Essentials of Banking”, four, one-day seminars offered at the IBA Center for Professional Development in Indianapolis. **A must for the newer community bank employee**, this series is designed to provide a complete knowledge of banking principles and operations. It is also geared toward veteran employees as a refresher course.

This popular program also boasts a staff of instructors who are not only popular IBA speakers, but also some of the best presenters in the banking field including Dianne Barton and Trina McCoy.

While it is recommended that the individual attend all four sessions of the series to receive an entire overview of banking, each session’s material stands alone; one session is not a prerequisite for another. From year to year, IBA plans to offer the same series beginning with any session. However, if you want your staff to learn about the material presented in a particular session, the program provides a thorough education and may be attended as a stand-alone class.

Series registrants cannot carry over funds to the next year’s four-seminar sequence. If you cannot attend one of the sessions, another individual from the bank may be sent as a replacement or that session’s manual will be sent and funds will be forfeited.

Join the Essentials of Banking four-part series!

Business Operations & Management - June 18, 2020

Lending, Bank Investments & Bank Performance - August 19, 2020

Safeguarding, Providing Exceptional Service & Growing the Bank - October 15, 2020

Banking 101 - TBD 2021

Seminar Topics

Bank Leadership

- Board of Directors
- Management Structure
- Banking Business Operations and Responsibilities
 - ◇ Key Departments and Divisions
- Compliance Management Fundamentals
 - ◇ Regulatory Expectations
 - ◇ Changing Role of Compliance
- Safety & Soundness and Risk Management

Key Products and Services

- Deposits, Negotiable Instruments/Payments
 - ◇ Identify the various types of deposit accounts offered by banks
 - ◇ Describe the nature of the contractual relationship between the depositor and the bank
 - ◇ Explain the differences between the various account titles
 - ◇ FDIC insurance on deposit products
 - ◇ Common challenges with deposit products
- Non-Traditional Bank Products and Services
 - ◇ Understand the role of Cash Management
 - ◇ Differentiate insurance products banks offer
 - ◇ Identify bank trust services
 - ◇ Regulations that pertain to non-traditional services

Who Should Attend

Any and all bank staff with up to five years’ experience and/or veteran employees who are looking for a refresher course.

Meet Your Presenter

Trina McCoy is the Senior Consultant and Facilitator, for Performance Solutions, Inc. (PSI), is a training and consulting company that has been a part of the banking community for over 35+ years. PSI specializes in providing solutions to the key challenges facing banks today in attracting and building relationships with their customers. Trina McCoy started her career with a regional bank in 1999 as an in-store branch manager and later managed a traditional branch. Trina also served as a Regional Manager and City President where she assisted with the opening of over 30 branches and was responsible for managing, training and operational duties. She has also served on the Board of Directors for Junior Achievement. Trina enjoys spending time with her family, shopping, gardening and decorating.

Agenda

9:00 a.m.	Program Begins
Noon	Break
1:00 p.m.	Program Resumes
3:00 p.m.	Program Adjourns

Login Information

WE ARE GOING VIRTUAL!

While we may not be able to get together "in person" for this event as originally planned given the circumstances, we know that education/training to stay current and be the best banker you can be is important. That's why we're committed to providing this session and we're taking it online via webinar technology. Same instructor with the same content, but you'll have the ability to join from wherever you're located from the convenience (and safety) of your computer. We look forward to seeing you online!