

Business Operations and 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

Credit Card Number

Exp. Date

Billing Zip Code

CVV Code:

Return this form to:

IBA Foundation Inc.

8425 Woodfield Place Suite 155E

Indianapolis, IN 46240

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

Image Use Policy: Registration in IBA events constitutes an agreement to the IBA's use and distribution of the attendee's image or voice. For more details: indiana.bank/policy

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 all training materials:

IBA Members Individual Session

\$225

IBA Members 4-Part Series

\$850

Surcharge of 100% for Non-Members.

Virtual Training

Participants will have the ability to join from wherever they are located from the convenience of their computer. This training course will be ran via Zoom technology. We look forward to seeing you online!

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 Beth Abney at 317-387-9380 or via email at babney@indiana.bank.

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.



*Safeguarding,
Providing
Exceptional
Service &
Growing the Bank
Part of Essentials of Banking
Program*

*Wednesday,
September 14, 2022*



Register online: www.indiana.bank

Program Overview

The Indiana Bankers Association (IBA) is pleased to present “Essentials of Banking”, four, one-day seminars offered virtually via zoom technology. **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 Christie Drexler.

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.

Seminar Topics

Ethics in a Sound Banking System

Corporate Governance

- ◇ Safeguarding the Bank's Assets
- ◇ Vendor Management

Security Regulations

- ◇ Regulation P – Privacy of Consumer Information
- ◇ Bank Protection Act of 1968
- ◇ Gramm-Leach-Bliley (GLB) Act and more

AML/BSA and Safeguarding the Bank

- ◇ Top Fraud Schemes
- ◇ Technology Threats to Banking
- ◇ Emerging Issues in Bank Secrecy Act

The Customer Experience

- ◇ Service is in the Eye of the Customer
- ◇ Handling Customer Complaints
- ◇ How to Provide WOW Service

Growing the Bank

- ◇ Ambassadors for the Bank
- ◇ Referrals versus Helping the Customer
- ◇ Building Profitable Relationships

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

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 profitable relationships with their customers. During the recent pandemic, PSI adapted and pioneered a virtual, "live" platform to meet the ever-changing needs in our banking communities. PSI's in-person, virtual, and hybrid training and speaking engagements are described as energized, fast-paced, interactive, and results-focused.

Christie Drexler

Christie has over 26 years of experience in the financial industry, serving community and regional banks. Her experience has been expansive to include successfully navigating retail, operations, treasury services, and commercial banking careers. She has served as Chief Retail Officer, Chief Credit Officer, and Market/Division President. Christie is a passionate facilitator and coach with a focus on developing competent, caring, and impactful leaders in all roles of banking.

Join the Essentials of Banking four-part series!

Safeguarding, Providing Exceptional Service & Growing the Bank - September 14, 2022

Banking 101 - March 8, 2023

Business Operations & Management - May 11, 2023

Lending, Bank Investments & Bank Performance - July 12, 2023

