

Fees & Location

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

IBA Members

\$225 Individual Session
\$850 Entire 4-part Series

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

This seminar will be held on Monday, November 8, 2021. This course will be held via zoom technology. Same instructor, same content but from the comfort of your home or office. Connection Links and the manual will be sent out on Friday, November 5, 2021.

AGENDA

8:30 a.m. Registration & Log In
9:00 a.m. Program Begins
12:00 p.m. Lunch
1:00 p.m. Program Resumes
4:00 p.m. Program Adjourns

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 Elizabeth DeHaven at 317-387-9380 or via email at edehaven@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.

Non-Profit Org.
U.S. POSTAGE
PAID
Indianapolis, IN
Permit No. 721



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

Mailing Address Information
If the addressee listed on this brochure is no longer employed at the bank or the mailing address is incorrect, please update the information on our website at www.indianabankers.org or contact Susan Clark at 317-387-9380, or email: seclark@indiana.bank

Seminar

A must for the newer community bank employee, this seminar is designed to provide an overview of banking business operations and management.

- Attend this IBA Seminar -

Lending Bank Investments & Bank Performance

*Part of the Essentials of Banking
Program*

*Monday
November 8, 2021*

**IBA Center for Professional
Development**

Indianapolis



**VIRTUAL TRAINING
HELD VIA ZOOM**

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. 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.

Meet Your Presenter

Christie Dexler is a Consultant with Performance Solutions, Inc., (PSI), a training and consulting company that specializes in providing “real world” solutions to the key challenges facing banks today in attracting and building relationships with their customers. She has over 26 years of banking experience. Her wide-range of training and consulting experience includes customer service and retail management, leadership development, business development, and service and sales development.

Before joining Performance Solutions, she held senior positions with Persons Banking Company, State Bank and Trust, and BB&T. Christie received her M.B.A. from Georgia College and State University, Milledgeville, Georgia.

Seminar Topics

- ◆ Lending Process
 - ◇ From Application to Decision
 - ◇ Loan Administration
 - ◇ Loan Review and Asset Recover
 - ◇ Loan Policy
- ◆ Banking Business
 - ◇ Source of Income for Bank
 - ◇ Investment Function
 - ◇ Types of Investments
 - ◇ Maximizing Asset Return
 - ◇ Asset and Liability Management
- ◆ Financial Statement
 - ◇ Balance Sheet
 - ◇ Income Statement
 - ◇ Understanding Performance Ratios
 - ◇ Analyzing Asset and Liability Mix
- ◆ The Annual Report
- ◆ Bank Performance Reporting
 - ◇ Uniform Bank Performance Report
 - Gathering Preliminary Data
 - Analysis of Bank Structure Using Ratios
- ◆ Banking Risks
 - ◇ Six Banking Risks
 - ◇ Interest Rate Risk Exposure
 - ◇ Enterprise Risk Management
- ◆ The CAMELS Rating System

Who Should Attend

This seminar is designed for Retail Managers, Branch Managers, Assistant Branch Managers, Branch Manager Candidates and anyone responsible for the direction and development of a retail branch. You can attend the series or each session will also be a stand alone program.

Lending, Bank Investments & Bank Performance

(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 Individual Session
- \$850 IBA Member 4-part Series

Participation in IBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or non-member rates. A 100% surcharge will be applied 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.indiana.bank

Return this form to:

IBA Foundation Inc.

8425 Woodfield Crossing Blvd.,

Suite 155E

Indianapolis, IN 46254-4673

317-387-9380 Fax: 317-333-7169

Register online: www.indiana.bank