

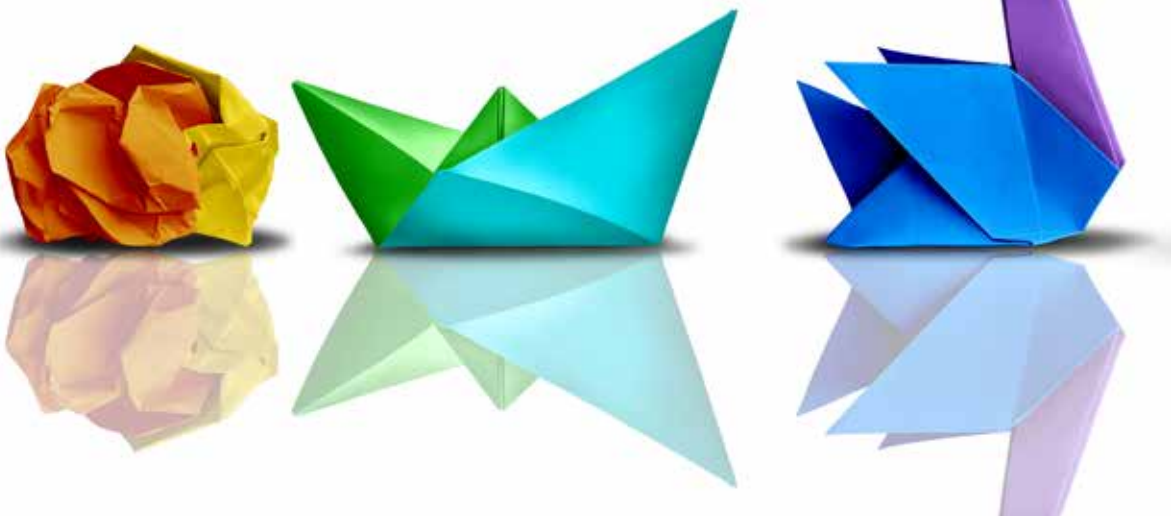
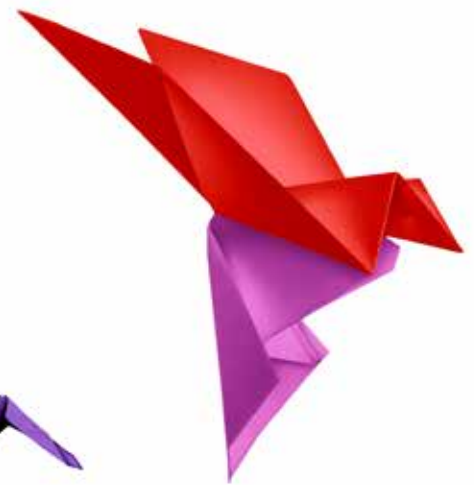
MAY 6-8, 2024  
THE WESTIN INDIANAPOLIS &  
INDIANAPOLIS CONVENTION CENTER



# CHANGE ENGAGE EVOLVE

A JOURNEY THROUGH **BANKING TRANSFORMATION**

# MEGA 2024



CHANGE  
ENGAGE  
EVOLVE

SOAR

**Embark on a transformative journey** at the 2024 Mega Conference themed “Change, Engage, Evolve: A Journey Through Banking Transformation.” Immerse yourself in a dynamic atmosphere where change is not just anticipated but embraced, engagement goes beyond transactions, and evolution becomes a strategic imperative. Explore the latest in digital banking, discover the keys to fostering resilience, and unravel the secrets to delivering quality customer service. Join forward-thinking discussions on innovative banking products that pave the way for a progressive future. This conference is your gateway to navigating the winds of change, actively engaging with industry shifts, and evolving toward a future of unparalleled success and adaptability.

## WE INVITE YOU TO JOIN US AT THE 2024 MEGA CONFERENCE.

### Forward Thinking Outlook

Renowned speakers, offering fresh points of view and inspiring stories, will help shift your perspectives and deepen your industry understanding. Business leaders, practitioners, consultants, and academics will share their valuable insights.

### A Learning Journey

Forty-eight concurrent sessions provide a complete education for banking professionals at all career stages. Choose from a broad range of topics to customize your learning experience and concentrate on solutions to assist in keeping your organization more cutting-edge while remaining compliant.

### Engaging Networking

Opportunities abound to connect with peers and colleagues around the state. From our expanded exhibit hall to networking events, throughout the hallways of the Indiana Convention Center, there is ample opportunity to meet other banking professionals who share your goals and challenges.

### Transformative Solutions

Throughout the conference, the exhibit hall will be available to give attendees the opportunity to review the newest products and services available to the Indiana banking community. Attendees will also receive a trade show guide and have access to the event mobile app, with complete exhibitor contact information. Many exhibitors will offer prize drawings, and the IBA will again host the popular exhibit game for bankers.



# KEYNOTES



## COVETED CUSTOMER EXPERIENCE

*Grow Your Business by Focusing on Three Things Your Customers Truly Care About*

Customer expectations never move backward. They want it right, and they want it right now. Given that customer experience is at least as important as price in most scenarios, getting those interactions perfect has a big impact on your success. You can't magically get better at every component of customer experience, but you CAN get better at the ingredients that matter most. Coveted Customer Experience is a fast-paced, dynamic, inspirational and hilarious presentation backed by real data, that shows you how to gain and keep more customers by improving on the three things that really matter to them.

### You Will Learn:

- Why customer experience is the fastest route to growth.
- When customer experience stops, and customer service stops.
- The three elements of your business that are non-negotiable for your customers, and where they'll give you a pass.
- What customers really expect from your business category, and how to exceed those expectations (without spending a fortune).

Sponsored by:  **FHLBank**  
INDIANAPOLIS

## PURPOSE OR PERISH

*Cultivating the Future of Employee Experience*

In the modern world people face a level of uncertainty that has never been experienced and it's significantly impacting our teams and our work. It's causing people to become overwhelmed, burned out, unfulfilled and lost. But it doesn't have to be this way. We all started our work from an engaged and purpose-driven place, but after months or years in a role, we lose sight of why we cared so much. We get stuck in the day-to-day minutia, the tasks, functions and responsibilities in our roles. We forget what doing great work means to all those who depend on us.

### You Will Learn:

- Obtain tools for cultivating a unique employee experience.
- Learn how to enhance resilience and eliminate workplace toxicity.
- Discover the secret for finding fulfillment and purpose beyond pay and benefits.
- Find out how to rediscover, reclaim and reconnect to a deeper sense of purpose.

Sponsored by:  **UnitedHealthcare**

# TUESDAY

MAY 7, 2024

Find full session descriptions at  
[indiana.bank/mega](http://indiana.bank/mega)

	DIRECTORS	OPERATIONS & TECHNOLOGY	RETAIL & CUSTOMER EXPERIENCE	RISK MANAGEMENT	SALES & CUSTOMER SERVICE	WEALTH MANAGEMENT
9:00 a.m. - 10:00 a.m.	Ten Things Every Community Bank and Its Directors Need To Know Now  Philip Smith <i>Gerrish Smith Tuck</i>	Leveraging AI for Banking Success  Kendra Ramirez <i>KR Digital</i>	Fighting Fraud: Trends and Solutions for Retail Bank Employees  Panel	Third-Party Vendor Management for Banks: Inside the New Guidance  Monica Bolin <i>Ncontracts</i>	Customer-Centric Banking: Navigating Success through Journey Mapping  Robert Zondag <i>Wipfli LLP</i>	Navigating the Claims Process  Rodney S. Retzner, William J. Barkimer & Micah J. Nichols <i>Krieg DeVault LLP</i>
10:30 a.m. - 11:30 a.m.	Banking Resilience: Navigating Success in Any Economic Climate  Heather Archer Eastep <i>Hunton Andrews Kurth</i>	Guardians Unveiled: Defending Against Ransomware Threats Targeting Community Banks  Milton Bartley <i>ImageQuest</i>	Mining for Gold: Driving Results with Your Data  Robb Rempel <i>Haberfeld</i>	Best Practices for Interest Rate and Liquidity Risk  Luke Mikles <i>The Baker Group</i>	Stop Selling and Start Connecting  Pat Dix <i>SHAZAM</i>	Effective Uses for Non-Judicial Settlement Agreements  Ellen M. Deeter Dale & Eke, PC

11:45 a.m. - 1:45 p.m. **JAY BAER** Coveted Customer Experience

**PLUS, FIVE STAR AND DIAMOND AWARDS**

2:00 p.m. - 3:00 p.m.	Trends in Bank Fraud  Jim Rechel <i>The Rechel Group</i>	Implications of GPT and Other Large Language Models for Banks  Connor Heaton <i>Strategic Resource Management, Inc.</i>	Digital Account Opening Mastery: Strategies for Bank Growth  Eric Cook <i>WSI Digital</i>	Impact of Rising Interest Rates on Credit Risk and Lending  Giulio Camerini, CRC <i>Crowe LLP</i>	Navigating Today's Banking Challenges: A Workshop on Prospecting and Value Differentiation  Jack Kasel <i>Anthony Cole Training Group</i>	Optimizing Team Performance: Metrics for Managing Trust and Wealth Workloads  Michael Dixon <i>Pohl Consulting</i>
3:30 p.m. - 4:30 p.m.	Perspectives on the Economy  Jim Bullard <i>Mitchell E. Daniels, Jr. School of Business at Purdue University</i>	Navigating the Instant: Lessons Learned While Adopting Instant Payments  Panel	AI and the Future of Payments  Pat Dix <i>SHAZAM</i>	Rightsizing Enterprising Risk Management Programs  Rebecca Towne <i>Quadrant Risk Advisory LLC</i>	Negotiating a Win-Win  Joe Micallef <i>Grow UP Sales</i>	The Strategic Advantage of Designating a Trust as Your Qualified Retirement Account Beneficiary  Keith P. Huffman & Kristin L. Steckbeck <i>Dale, Huffman &amp; Babcock</i>

4:30-5:30 p.m. • MEGA CELEBRATION • EXHIBIT HALL

MAY 8, 2024

Find full session descriptions at  
indiana.bank/mega

# WEDNESDAY

## BUSINESS LENDING

## COMPLIANCE

## FINANCIAL MANAGEMENT

## HUMAN RESOURCES

## LEADERSHIP

## MARKETING

Strategic Loan  
Growth in a Volatile  
Rate Environment

Tim Keith  
*Infusion Marketing  
Group*

Prepare for 1071:  
Grasp Implications,  
Navigate Rules & Plan  
Implementation

Michelle Strickland,  
CRCM  
*TCA Compliance*

Stacking the Deck in  
Your Favor: Secrets  
of High-Performing  
Banks

Robb Rempel  
*Haberfeld*

Where Did All the  
Workers Go?

Marilyn Faulkenburg,  
SHRM-CP, SHRM-SCP  
*MJ Training & Consulting*

Empowering  
Mid-Level Leadership:  
Building a Positive  
and Productive  
Work Culture

Amber Fields  
*trueU*

Do's and Don'ts  
of Email  
Marketing

Allyson Twigg  
*The Twigg Group*

9:00 a.m. - 10:00 a.m.

What's Wrong with  
My Lending Culture?  
Adapting to CFPB  
1071 Reporting  
Requirements

Rob Newberry  
*Abrigo*

Impact and Responsive-  
ness under the New  
CRA: How Can Your  
Institution Be Impactful  
and Responsive?

Jason Keller, MPPA  
*Walters Kluwer*

Navigating the  
Financial Horizon:  
Bank Tax Update

Mike Summers &  
Bryan Clevenger  
*FORVIS*

Creating a  
Culture of  
Belonging

McChelle Callen,  
SPHR, SHRM  
*Equitable HR Consulting*

Stop Looking Like a  
Novice on LinkedIn:  
Five Steps to Building  
a Profile You Can Be  
Proud of Online

Eric Cook  
*WSI Digital*

Practical Applications  
for Generative AI in  
Your Bank

Derek Baker &  
Ryan Pleggenkuhle  
*Mills Marketing*

10:30 a.m. - 11:30 a.m.

11:45 a.m. - 1:15 p.m. **JOSHUA EVANS** Purpose or Perish

**PLUS, COMMITMENT  
TO COMMUNITY  
AWARDS**

1:15 – 1:40 PM **DESSERT & EXHIBITOR DRAWINGS**

Betting the Bank on  
Borrower Sales  
Projections:  
Hedging Your Bet

Dev Strischek  
*Devon Risk Advisory  
Group*

The Full Circle:  
Redlining Examples  
and Risk Mitigation  
Strategies

Adam Witmer  
*Compliance Cohort*

Profitability Under Attack:  
Safeguarding Financial  
Success through Effective  
Deposit and Loan  
Strategies

Rob Newberry  
*Abrigo*

Unpacking  
Compensation in a  
Changing Workforce:  
Strategies for Success

Megan Nail,  
CCP, SHRM-SCP, CEBS  
*NFP*

Quiet Quitting:  
What You Can Do  
About It

Theresa Valade  
*Success Trek, Inc.*

Transform your  
Messaging from  
Mundane to  
Memorable

John Crilly  
*BIG*

1:40 p.m. - 2:30 p.m.

Enhancing Portfolio  
Monitoring: A  
Proactive Approach  
in Uncertain  
Economic Times

Mike Horrocks  
*Baker Hill*

Reg E Disputes:  
What Everyone is  
Talking About

Amy Koshiol &  
Karen Leiter  
*CLA*

The Economy, White  
House, Congress, and  
the Fed: What's Right  
and What's Wrong

Stephen Happel  
*Arizona State Univ.,  
W.P. Carey School of  
Business*

Does AI Know Why  
the Chicken Crossed  
the Road? Managing  
Risk for Employers in  
the Age of AI

Shelley M. Jackson &  
Chloe N. Craft  
*Krieg DeVault LLP*

Building Resilience:  
Strategies for Leaders  
in Navigating Work-  
place Transitions

Joshua Evans  
*Enthusiastic You! LLC*

Measuring the ROI  
of Your Bank's  
Digital Marketing  
Strategy

Eric Cook  
*WSI Digital*

2:40 p.m. - 3:30 p.m.

3:30 p.m. - MEGA CLOSING - HAVE A SAFE TRIP HOME!



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### GOLF TOURNAMENT MONDAY, MAY 6 NOON SHOTGUN START

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DAVIS**

All golfers are invited to the men's and women's combined tournament at Country Club of Indianapolis. We will be using a four-man, best-ball scramble format. Prizes will be awarded to the first, second and third-place teams. The golf fee includes green fees, cart rental, lunch and prizes.

### ASSOCIATE MEMBER APPRECIATION RECEPTION MONDAY, MAY 6 • 6:00–7:00 PM

Join us at the Westin Indianapolis Downtown as the conference kicks off on Monday, May 6, for a reception in honor of our valued associate members. This event is open to all registrants.



### MEGA CELEBRATION TUESDAY, MAY 7 • 4:30–5:30 PM

The Mega Celebration brings attendees together in the exhibit hall with food, drink and entertainment immediately following Tuesday's sessions. This event is open to all registrants and is the perfect time to visit with old friends, make new acquaintances, and peruse the latest in bank products and services offered by our exhibitors.

### AFTER HOURS WITH THE IBA MONDAY AND TUESDAY NIGHTS 9:00 PM–MIDNIGHT

Looking for an intimate setting to enjoy camaraderie with colleagues? IBA Chairman Ben Bochnowski invites you to join him in the Chairman's Hospitality Suite at The Westin Indianapolis Downtown. The suite will be open Monday and Tuesday evenings. Please stop by!



### 3RD ANNUAL MEGA FINTECH SHOWCASE TUESDAY, MAY 7 • 10:30–11:30 AM

Experience the live pitches of emerging companies in the 2024 Mega Fintech Showcase. Learn about the companies' new technologies and opportunities for your bank to implement innovative solutions and flourish. This session is designed to allow bankers to engage with early-stage fintech companies that focus on developing products and solutions specifically for community banks and their customers.

Sponsored by: **pri**

PROFIT RESOURCES

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## LOCATION

All sessions for the 2024 Mega Conference will be held at the Indiana Convention Center at 100 S. Capitol Ave., Indianapolis, IN 46225.



## HOTEL

A block of overnight rooms has been reserved at the Westin Indianapolis at a rate of \$189 per night. Reservations can be made online (<https://book.passkey.com/go/IndianaBankersAssociation2024>) or via phone at 317-262-8100. Please note that cancellations must be made 72 hours in advance of check-in, or one room night and tax will be assessed. The Westin is located at 241 W. Washington St., Indianapolis, IN 46204 and is attached to the Indiana Convention Center via skywalk. The room block expires on April 15, 2024.



## REGISTRATION

Event registration is available on the IBA website at [www.indiana.bank/events/mega](http://www.indiana.bank/events/mega). There is also a PDF registration form on the website for your use.

## FEES

<b>Two-Day</b> .....	\$360 Member/\$720 Non
<b>Single Day</b> .....	\$215 Member/\$430 Non
<b>Golf</b> .....	\$150 Bank Member
	\$195 Associate Member

*(Golf is exclusively available to IBA members)*

## MEGA BUCKS

To encourage full participation in the Mega Conference, the IBA offers a Mega Buck program that allows members to purchase multiple conference registrations at a discount. To utilize the Mega Buck discount program, a member purchases at least 10 Mega Bucks. A single MB covers either the golf tournament or one day of attendance at the conference. For example, a person who registers for two days will use two MBs, and to also register for golf would require an additional MB. This year MBs are \$150 each. Contact Susan Clark for a discount code prior to registering. Mega Bucks are reserved exclusively for IBA members.

## CANCELLATION POLICY

Attendee registration cancellations received by the close of business on Monday, April 29, will receive a full refund. Cancellations after that date and "no shows" will result in the registration fee being charged. Substitutions are always welcome. Mega Buck registrations are nonrefundable.

## QUESTIONS

Contact Susan Clark at [sclark@indiana.bank](mailto:sclark@indiana.bank) or 317-333-7161 or Chris Bennett at [cbennett@indiana.bank](mailto:cbennett@indiana.bank) or 317-333-7142.

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