Fees

The following fees include the program, training materials, continental breakfast, lunch and refreshments for each day.

IBA Members - $425

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

Location

This two-day course will be held on Tuesday & Wednesday, July 28–29, 2020 at the IBA Center for Professional Development, located at 8425 Woodfield Crossing Blvd., Suite 155E, Indianapolis, IN 46240. Directions, map & a list of local hotels are available on our website, www.indiana.bank or by calling 317-387-9380.

This program can also be attended virtually!

While we understand that some of you are not permitted to travel 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 program both IN PERSON AND VIRTUALLY. Each day the training will be streamed live from the IBA Center for Professional Development.

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. This is a completely LIVE virtual training.

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 via e-mail at edehaven@indiana.bank or phone the IBA Office at 317-387-9380.

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.
PROGRAM OVERVIEW

We are pleased to announce the Universal Banker Certification Program. With reduced in-branch transactions and customer visits and increase in technology, less traditional teller functions are needed. No longer can a frontline team member say: “It’s not my job!” Today’s frontline team is shifting from traditional positions (tellers, new account representatives, financial service representatives, etc.) to a multi-tasking, “universal” banker. Today’s customer base is shifting from the traditional, visit the bank twice a week to quick response, electronic banking relationship with the bank.

This two-day certification program focuses on the essentials for today’s universal banker in providing exceptional service, making referrals, and building profitable relationships from millennials to baby boomers. The Certification Program is packaged full of checklists, job aids, case studies, examples, and "real world" situations. Attendees will receive a Certification of Completion.

Target Audience: All Retail bank employees in customer contact positions

COVID-19 RELEASE AND HOLD HARMLESS:
By registering for and attending an Indiana Bankers Association ("IBA") event or meeting, you acknowledge that there is an unknown risk of potential exposure to COVID-19 from contaminated surfaces or contact with other persons and you voluntarily agree to assume and accept said risks. Such exposure could result in illness, disability or death. You agree to waive, release hold harmless, and indemnify the IBA and its affiliates, directors, officers, employees and agents from death. You agree to waive, release hold harmless, and indemnify the IBA and its affiliates, directors, officers, employees and agents from and against any and all claims of liability and/or damages from exposure to COVID-19. Registrants and attendees warrant and represent that they will comply with all governmental, IBA, and host facility laws, orders, restrictions and guidelines regarding COVID-19 when participating in an IBA event or meeting.

CERTIFICATION PROCESS

The benefits of this certification process include:
• An investment in developing “best practices” for your bank’s retail network.
• An educational resource for training and career development and retention.
• Recognition and opportunities for frontline team members.
• A foundation builder for banking schools.
• A commitment to successful, profitable, efficient and effective retail banking network.

What is the Process for Certification?
This is a comprehensive certification program that focuses on two key components:
1. Completion of the Universal Banker Certification Program.
2. Completion of assessment before and after attending the Certification Program.

SEMINAR TOPICS

- Understanding the Changing Role of Retail Banking
- Defining and Developing the Universal Banker
  ◦ What are the Core Competencies
  ◦ Professionalism for Today’s Bankers
  ◦ Etiquette and Netiquette Tips and Tools
  ◦ Networking and Representing the Bank
- Speaking the Customer Language
- Communicating for Results
- Becoming the One Source for the Exceptional Customer Experience
- Moving from Order Taker to Relationship Banker
- Maximizing the Customer On-Boarding Process
- Making Referrals as Simple as A-B-C
- Consumer Lending Basics
- Meeting the Needs of Today’s Different Generations of Customers
- And much more…

PRESENTER

Trina McCoy is the Senior Consultant and Facilitator for Performance Solutions, Inc., a bank training and consulting company that specializes in providing "real-world" solutions to the key challenges facing banks today in developing the team and building profitable relationships. As a former banker, Trina has held positions as City President, Sales Manager, Corporate Trainer, Frontline Banker, Mortgage Originator and Loan Officer. She also assisted with the opening of over 30 branches in a de novo market. Her training is energized, fast paced, interactive and results-focused.

AGENDA BOTH DAYS

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:30 a.m.</td>
<td>Registration &amp; Continental Breakfast</td>
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<tr>
<td>9:00 a.m.</td>
<td>Program Begins</td>
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<tr>
<td>12:00 Noon</td>
<td>Lunch (included)</td>
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<tr>
<td>1:00 p.m.</td>
<td>Program Resumes</td>
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<tr>
<td>4:00 p.m.</td>
<td>Program Adjourns</td>
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REGISTER ONLINE: www.indianabankers.org