

# 2026 LOAN OPERATIONS MANAGER FORUM

**March 10, 2026 July 29, 2026 November 3, 2026**

## An Investment in Your Bank's Future!

This forum provides an opportunity for community bank loan operations professionals to exchange ideas freely, dissect problems and discuss important issues with their peers. For most banks, the investment in technology to support the lending function continues to expand and become more complex. This forum is designed to help deal with the technical side, as well as to be a rewarding experience where members can grow professionally and personally.

## Benefits of the Forum

- Improve the efficiency of loan support processes, whether automated or manual
- Reduce the risk in your loan portfolio from an operational and transactional perspective
- Optimize staffing levels to handle loan production
- Increase your understanding of regulatory and compliance requirements
- Form relationships with other loan operations managers
- Get solutions and practical ideas for your most pressing concerns
- Discuss with peers what works and what doesn't
- Grow professionally as well as personally

## Who Should Attend?

The IBA is pleased to provide this forum for community bank managers and leaders involved with the bank's loan operations function.

## Possible Forum Topics

Forum participants are able to submit topics in advance of the meetings, as well as during the meeting. To encourage open discussion, participants usually are placed in two break-out groups: The first arranged by bank size, with participant topics and topics provided by the facilitator. The second break-out is arranged by core system and focuses more on issues unique to each core and related software.

Below are some examples of participant topics

- Benefits and advantages/disadvantages of automated document preparation software
- Effective ways to cross-train loan support employees
- Positions within loan operations are conducive to remote or hybrid work
- Hiring, recruitment and retention strategies that work
- Loan operations structure and hierarchy
- New or emerging technology solutions
- Concerns or issues raised in recent regulatory examinations
- More people issues: managing vs. micro-managing
- Ideas for loan support activities that can be automated
- Best practices in post-closing reviews and similar checklists for insurance tracking and collection of financial information from customers
- Handling of lien documents, including UCC filings and mortgage recordings
- Efficient administration of construction loans and the draw process



## Facilitator: Richard Hamm

Richard Hamm with Advantage Consulting & Training has been training and working with bankers for over 30 years, designing and delivering courses specializing in commercial lending and credit, including portfolio and risk management, commercial real estate (CRE) and appraisals, plus selling and negotiating skills, and director training. His clients include national associations such as the American Bankers Association (ABA), The Risk Management Association (RMA), now called ProSight after merging with Bank Administration Institute (BAI); regional banking schools such as the Barret Graduate School of Banking – Memphis, the Graduate School of Banking – Wisconsin and the Graduate School of Banking at Colorado; state banking and community banking associations in a dozen states; and individual banks. Based in Huntsville, AL, he has owned/operated Advantage Consulting & Training for over 20 years, after a 22-year banking career including senior positions in lending and credit, including president of a community bank through formation and acquisition of an existing bank management, plus responsibilities for the loan operations function of a community bank.

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## REGISTRATION

**How the Forum Works**

- The group will be small - usually about 20-25 participants.
- Participants are strongly encouraged to suggest agenda topics of interest, and the facilitator provides additional areas for discussion and upcoming issues/references from a regulatory perspective
- Participants get the benefit of networking and making queries within the group between meetings
- Comprehensive handouts are compiled and provided to each participant, along with a binder for retention of handouts, notes and references

**Registration Fee for All Three Sessions:**
The following fees include the program materials, continental breakfast, lunch and refreshments.

**$999 per IBA member**
A surcharge of 100% will be applied for non-members.

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

### Registration Form (Three Sessions)

Dept. 21

Please type or print legibly.

Bank Name _____

Attendee Name _____

Email Address _____

Additional Attendee Name _____

Email Address _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Cell # (in case of weather emergency) _____

### Payment Information

Credit Card Information (circle one):

☐ MasterCard ☐ VISA ☐ AMEX ☐ Invoice Me

Total Amount Due $_____

_____
Cardholder Name CVV Code

_____
Card Number Exp. Date

### Forum Dates:

**March 10, 2026**
**July 30, 2026**
**November 3, 2026**

### Cancellation Policy:

Due to our commitments, the price is inclusive of all three sessions. A full refund for the three-session forum will be given for cancellations received prior to the first session. Any registrant who does not cancel before the first session will be billed the full registration fee and sent the materials. Substitutions are welcome at no additional charge.

INDIANA BANKERS ASSOCIATION

**Register online at indiana.bank!**