2026 SENIOR RETAIL BANKING FORUM

IBA Center for Professional Development

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

January 15, 2026 • May 7, 2026 • September 17, 2026

An Investment in Your Bank's Future!

The Senior Retail Banking Forum provides a platform for Retail Banking Officers to exchange ideas, dissect problems, discuss important issues, brainstorm solutions, as well as network and build lasting relationships with peers. You do not want to miss this opportunity to invest in your bank's future!

Benefits of the Forum

- Improve the profitability of the Retail Bank
- Get help from other bankers on your most pressing retail banking issues
- Receive recommendations on vendors and policy guidance
- Help others and expand your own knowledge
- Learn from the success and mistakes of others in your field
- Get tips on building high performing cultures
- Grow your team member engagement
- Keep up with current events
- Avoid regulatory surprises in bank exams
- Build your bank's service excellence commitment

Audience

This Forum is targeted to Senior Retail Banking Officers serving in roles such as Chief Retail Officer, Head Retail Officer, Regional Sales and Service Manager, and Head Retail/Deposit Operations Managers. Participants who are unable to attend a particular session are encouraged to send substitutes from their bank who they believe will benefit from the experience or will provide value to other attendees.

Possible Forum Topics

- **Current Events:** deposit rates and deposit growth strategies; addressing customer concerns about recent bank failures; overdraft/NSF Fees; NSF representments; FedNow; etc.
- **Regulatory:** recent loan exam findings; compliance best practices; regulatory amendments, implementation, and advisories; etc.
- **People Issues:** employee retention strategies; maximizing team member engagement; designing training programs; progressive discipline tools; coaching strategies; employee recognition programs; recruiting best practices; flexible work hours; help with job descriptions; etc.
- **Sales and Service:** customer service measurement tools; goal setting; incentives; sales and service standards and training; holding effective retail leadership team meetings; client communication best practices; accountability practices; business development strategies; etc.
- **Operational:** addressing internal and external fraud; branch remodels and opening strategies; safety and security; banking hours; customer service center staffing and responsibilities; etc.
- **Technology:** CRM software; core provider recommendations and conversion strategies; ITM recommendations and best practices; customer care center software; online banking and business online banking vendors and procedures; consumer loan platform recommendations; etc.
- **Marketing and Product Development:** leveraging word-of-mouth marketing; driving positive online reviews; effective deposit growth/retail loan growth strategies; CD and MMA products; vendor partnerships; workplace banking; etc.
- **The Big Picture:** strategies to grow bank profitability; organizational structure and culture alignment; partnering with other divisions to grow the bank; deepening client relationships; improving communication across departments; etc.

Facilitator: Christie Drexler



Christie Drexler is the Owner of Drexler Consulting, LLC, a financial services consulting and training business focused on developing purpose-driven, competent, servant leaders in all roles of banking. In association with Performance Solutions, Inc. and Dianne Barton, Christie has offered training and consulting services through Drexler Consulting, LLC, for the past five years.

In addition, Christie has twenty-six years of direct experience in the financial services industry, working for both community and large regional banks. Her experience has been expansive to include successfully navigating retail and commercial banking careers. She has served as Division President, Market President, Chief Credit Officer, Chief Retail Officer, and Regional Sales & Services Manager. Christie has a B.S. in Finance from Berry College and an MBA from Georgia College and State University. She is a passionate facilitator and coach who strives to live the values and leadership strategies she teachers in her training programs.

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How the Forum Works

- The Forum will meet three times a year.
- Attendees are encouraged to submit topics of interest one to two weeks in advance of the Forum date.
- The Forum agenda will be built around member submitted topics, as well as topics submitted by the facilitator and other Retail Forum groups which meet across the country.
- Hot topics and/or current events directly affecting Retail Banking will begin each agenda.
- Supplemental documents will be provided by the facilitator to enhance the discussion or for later reference.
- Each attendee's contact information and relevant details (bank assets size, number of branches, core systems) will be shared with the group to enhance networking.
- There is no beginning date or end date to the Forums. New attendees can register and join any session.
- The Facilitator and attendees will often walk away with action items to share best practices, policies and procedures, and other helpful tools with the group after the Forum.
- An email group will be set up by the Facilitator to foster the exchange of information between Forums.

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.

Forum Meeting Dates:

January 15, 2026
May 7, 2026
September 17, 2026

Senior Retail Officer Banking Forum

3 Session Registration
Dept. 35

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 (check one):

☐ MasterCard ☐ VISA ☐ AMEX ☐ Invoice Me

Total Amount Due $_____

_____
Cardholder Name CVV Code

_____
Card Number Exp. Date

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!