

Basic Banking School

Basic Banking Skills Designed For:
New Bank Employees, Management Trainees,
Employees With Limited or Specialized Banking
Experience and Soon-To-Be-Promoted Employees



September 15-20, 2002
Oklahoma State University, Stillwater

Purpose & Philosophy

This is the eleventh Oklahoma Bankers Association Basic Banking School. The school is designed to introduce students to basic banking concepts as they relate to the overall functioning of a bank. The school will meet the prerequisites for students planning to attend the OBA Intermediate School of Banking.

Enrollment Qualifications and Admissions Policy

The school is open to all employees of OBA member banks. Employees of OBA member banks will be accepted first, with applications from non-OBA members accepted next. So that students may gain the most from the course of instruction and group environment, enrollment is limited to 60 students.

School Plan

This school is designed to address the educational needs of

- New bank employees
- Management trainees
- Employees with limited or specialized banking experience
- Soon-to-be-promoted employees

Requirements & Regulations

Each student will be required to attend every class until adjournment at 12:00 p.m. Friday, September 20, 2002. An attendance record will be kept and his or her respective bank shall be notified at the close of the session if the student's participation is not satisfactory. Additionally, all students are required to take the comprehensive final examination at the end of the school. Each student's test score will be made available to him/her at the close of the school. The rules and regulations of Oklahoma State University prevail. There will be no alcoholic beverages in the rooms at any time. Failure to adhere to this rule will mean immediate dismissal and forfeiture of all fees. The hotel and classrooms are non-smoking facilities.

Housing

Living arrangements are designed to encourage the maximum personal relationships within the group as a whole; therefore, all rooms will be assigned at the Atherton Hotel at Oklahoma State University. All accommodations will be double occupancy unless otherwise noted. Single student housing is available for an additional \$325. Off campus housing is prohibited. Students with special needs should contact the OBA so that arrangements can be made.

Dress

Dress for class is informal, but in good taste. Tailored shorts and jeans are acceptable - no cutoffs or gym shorts.

Registration

Students will register at the Atherton Hotel lobby from 4:30 - 5:00 p.m. on Sunday, September 15. All students are required to register at this time and attend the orientation at 5:00 p.m.

The Bottom Line

See below for registration fees. This covers all expenses for room, one year subscription to the *Oklahoma Banker*, books and tuition. Breakfast, lunch and 3 evening meals are provided. Fee must accompany this application. Registration deadline is September 1, 2002. Upon cancellation by September 1, the full fee will be returned to the bank. A \$400 fee will be retained if cancellations are made after September 1 through September 6, 2002. Cancellations received after September 6 will be subject to forfeiture of fees. All cancellations must be in writing. Single student housing is available for an additional \$325.

EARLY-BIRD REGISTRATION:

Any registrant enrolling prior to August 16, 2002 will be afforded the following discounted rate: \$925 OBA Members/ \$1850 Non-Members.

MULTIPLE REGISTRATION:

Any bank enrolling 2 or more students will be afforded the following discounted rate: \$925 first student and \$850 each additional student thereafter for OBA Members/ \$1850 first student and \$1,775 for each student thereafter for Non-Members.

REGULAR REGISTRATION:

Single registration fee after August 6, 2002: \$975 OBA Members/ \$1,950 Non Members.

Basic Banking School Board

Chair

Peggy Hancock
RCB Bank, Claremore

Members

Susan Frame
Community Bank & Trust, Tulsa

Janice Hunter
Exchange National Bank, Moore

Jerry Hensley
Oklahoma National Bank, Tulsa

Tom Locke
First National Bank of Grove, Grove

Kelly Poland

Local Oklahoma Bank,
Oklahoma City

Gary Roy

First Bank & Trust Co., Luther

Jeff Massad

Quail Creek Bank, N.A.,
Oklahoma City



Basic Banking School

September 15-20, 2002

Oklahoma State University, Stillwater

APPLICATION FOR ADMISSION

A check payable to the Oklahoma Bankers Association must accompany this application. This fee covers all instruction, materials, tuition, most meals, refreshment breaks, one-year subscription to the *Oklahoma Banker*, and housing. The registration deadline is September 1, 2002.

Earlybird Registration:

\$925 OBA Members
\$1,850 OBA Non-Members

• To qualify, you must enroll by August 16, 2002.

Multiple Registrations:

\$925 first student/\$850 each add'l. — OBA Members
\$1,850 first student/\$1,775 each add'l. — Non-OBA Members

• To qualify, students must be from the same bank.

Regular Registration: After August 16, 2002

\$975 OBA Members
\$1,950 Non-OBA Members

Note: Single student housing is available for an additional \$325.

REFUND POLICY: Any registrant withdrawing by September 1, 2002 will receive a full refund. A \$400 cancellation fee will be charged for cancellation requests received on or after September 1, 2002, through September 6, 2002. Cancellations received after September 6, 2002 will be subject to total forfeiture of fees. **ALL CANCELLATIONS MUST BE IN WRITING.**

I, the undersigned, have read the attached information which describes admission criteria and understand that I will be expected to attend all scheduled classroom and work periods, to prepare all assigned work, to participate in classroom sessions, and to successfully complete the final examination to qualify for graduation.

Signature

The submission of this application has been approved by the bank. (To be signed by the president, department head, personnel officer or other executive authorized by the bank.)

Nominating Officer's Signature

Nominating Officer's Name and Title

This institution does not discriminate with regard to race, color, sex or age.

OPTIONAL

I consent to the release to my employer of grades and other measures of performance in courses taken by me at the school.

Signature

Date

Please send grades or other measures of performance to:

PLEASE TYPE THE FOLLOWING INFORMATION

Name (as you want it to appear on certificate)

Name or first name (for badge)

E-mail

Social Security Number

Date of Birth (Mo/Day/Year)

Age

()

()

Business Phone

Fax

Your Title

Bank Name

Post Office Box

City

State

Zip

Name of person (if any) you would like to room with:

Do you have any physical or medical conditions that might influence room or seating arrangements? _____ If yes, please explain.

Prefer single housing and have enclosed the additional \$325.

Application must be returned by September 1, 2002

(OVER)

Applicant's Title <i>(check only one)</i>	Size of Bank in Deposits	Size of Bank in Assets	Total Years in Banking
1__ President/CEO	1__ \$0-5mm	1__ \$0-5mm	1__ Less than 1
2__ Executive VP/Sr. VP	2__ \$5-10mm	2__ \$5-10mm	2__ 1-3 years
3__ Vice Pres./Cashier	3__ \$10-20mm	3__ \$10-20mm	3__ 3-5 years
4__ Asst. VP/Asst Cashier	4__ \$20-50mm	4__ \$20-50mm	4__ 5-10 years
5__ VP/Loan Officer	5__ \$50-100mm	5__ \$50-100mm	5__ 10-15 years
6__ Asst. VP/Loan Officer	6__ \$100-250mm	6__ \$100-250mm	6__ 15 years & over
7__ Teller/Head Teller	7__ \$250mm & over	7__ \$250mm & over	
8__ Auditor	8__ Bank Holding Company	8__ Bank Holding Company	
9__ Admin. Asst./Secy.	9__ Other	9__ Other	
10__ Customer Service Rep.			
11__ Other (specify) _____			

Educational Background <i>(check highest level achieved)</i>	OBA Schools Attended	Yr.
1__ High School graduate	1__ Compliance	___
2__ Some College (Hrs___)	2__ Consumer Lending	___
3__ Associate Degree	3__ Operations	___
4__ Bachelor's-Business	4__ Commercial Lending	___
5__ Bachelor's-Other	5__ Intermediate	___
6__ Masters-Business	6__ Other _____	___
7__ Masters-Other		
8__ Ph.D.		
9__ Law Degree		

BUSINESS EXPERIENCE

List in chronological order candidate's banking and other business experience. Include dates, bank or other business firms, and a brief description of duties.

Briefly describe your major responsibilities in the bank.

EMERGENCY INFORMATION

In case of emergency, please contact:

Name _____ Address _____

Relationship _____ Work Phone _____ Home Phone _____

Please make your check payable to the Oklahoma Bankers Association and mail to:

Oklahoma Bankers Association

Basic Banking School

PO Box 960173 Oklahoma City, OK 73199-0789

FAX: 405/424-4518

Questions? Call Janis Reeser or Nancy McKinnis at (405) 424-5252 E-mail: janisr@oba.com

FOR OBA USE ONLY

Rec'd	By	Amt.	Ck#	Rt#
-------	----	------	-----	-----