

# **OBA Strategic Membership**

***A Great Opportunity to Get Your Company  
Closer to Oklahoma's Banks***

The Oklahoma Bankers Association is proud to offer a membership classification for companies that serve the needs of the Oklahoma banking industry. OBA *Strategic Memberships* typically are held by accounting firms, consultants, vendors, insurance companies, out-of-state commercial banks, legal firms and other companies that directly provide services or products to the state's banks.

OBA Strategic Members enjoy many advantages. These benefits include:

Receipt of regular OBA mailings, including information about all Association events and educational programs, OBA product and service materials and information sent to CEOs of OBA-member banks.

A subscription to the *Oklahoma Banker* newspaper, the premier source of banking news and information in the state.

A complimentary copy of the *Official Directory of Oklahoma Financial Institutions*, which provides detailed information on each Oklahoma bank.

An opportunity for the Strategic Member to inform banks about its products and services through the *Bankers' Resource Directory* section of the *Oklahoma Banker* newspaper.

The opportunity to place marketing materials in displays at the OBA offices.

Preference in assignment of exhibit or hospitality space at all OBA events, after member bank requirements have been met.

Member discounts on advertising in the *Oklahoma Banker* and for booth space at the annual trade show.

The ability to have any reasonable number of registrants for OBA events.

In short, an OBA Strategic Membership gives your company a great opportunity to increase its exposure to and connections with the Oklahoma banking industry. And it's all for less than the cost of one full-page advertisement in many trade publications.

# **Oklahoma Bankers Association**

## ***Continuing a Proud Tradition of Service***

For more than 100 years, Oklahoma banks have relied upon a strong and active statewide organization working to address their changing needs and challenges. That organization – the **Oklahoma Bankers Association (OBA)** – today serves approximately 265 member banks. Founded in 1897 and based in Oklahoma City, the OBA assists its members with government relations, educational programs, legal and compliance services, communications, insurance and numerous products and services.

In its quest to provide unsurpassed services and products, the OBA relies on its members for input and leadership. The Association is led by a board of directors consisting of volunteer bankers from across Oklahoma. The Association also depends on numerous standing committees and task forces, comprised of bankers, to guide OBA staff members in their activities. Roger Beverage leads the OBA professional staff as president and CEO.

Each year, the OBA holds its annual convention to elect officers and conduct association business, promote fellowship among bankers and recognize accomplishments of outstanding bankers.

The OBA owns two subsidiaries – the **OBA Services Company** and the **OBA Insurance Agency** – that provide products and services for the banking industry. The Association also includes the **Oklahoma Bankers Foundation**. The foundation awards college scholarships and also seeks to deter crimes against banks through funding of the OBA Robbery Reward Program.

# **OBA Government Relations**

## ***The Bankers' Voice in Oklahoma City and Washington***

Given the huge impact of public policy on banking, it's fitting that the Oklahoma Bankers Association places its highest priority on government relations. The OBA staff and volunteer leaders work at the State Legislature and in Congress seeking passage of legislation beneficial to the banking industry. Also of vital importance are Association efforts to defeat proposed bills that could negatively impact banks.

The Association closely monitors developments in the regulatory arena as well and keeps its members apprised of significant changes. The OBA works with the American Bankers Association, other state bankers associations and governmental agencies in its efforts to see that regulations are fair and sensible.

As in other areas, the Association's activities on legislative and regulatory matters are banker-driven. The OBA Government Relations Council, composed of bankers, studies legislative issues and makes recommendations to the OBA Board of Directors. The OBA staff, led by President and Chief Lobbyist Roger Beverage, then works with volunteer leaders to carry out the board's directions.

Involvement of individual bankers is critical to the OBA's fortunes in the legislative realm. Bankers participate in many ways: contacting and developing relationships with legislators, taking part in the OBA Annual Washington Visit, serving on the Government Relations Council, supporting candidates that share bankers' views on important issues, and by joining the OBA Professional Membership Program.

Another vital aspect of the OBA's government relations is raising funds for the Association's two Political Action Committees. These committees, **OBA★FEDELECT** and the **OBA★ELECT**, support candidates for elective office who understand the need for a strong, viable banking industry.

# **OBA Legal Affairs**

## ***Helping Members Deal with Compliance and Legal Pitfalls***

To help Oklahoma bankers cope with ever-changing and complex banking regulations and legal issues, the OBA legal staff assists banks in several ways:

The OBA's general counsel and assistant general counsel answer banker questions each day on a wide range of legal and regulatory topics.

The legal department monitors changing federal and state regulations and laws and reports on them in a four-page *Legal Briefs* section appearing each issue of the *Oklahoma Banker* newspaper.

The general counsel reviews and analyzes (and, as appropriate, works to revise) relevant bills introduced in the Oklahoma Legislature and also evaluates and comments on regulatory proposals.

The general counsel and assistant general counsel, along with other speakers, assist in teaching at educational seminars sponsored by the OBA throughout the year.

In some instances, when litigation involving an OBA member bank could potentially impact a large number of Oklahoma banks, the OBA provides legal assistance in the form of amicus briefs or as a party to the lawsuits.

# **OBA Education**

## ***Promoting a Well-Trained, Professional Workforce***

Professional development plays a vital role in banking today. When bankers are well trained for their jobs, everyone wins – the bankers, their banks, shareholders and, of course, customers. Recognizing the critical importance of training, the OBA Education Department offers an extensive lineup of seminars and schools covering almost every area of bank operations. These programs reach more than 4,000 Oklahoma bankers annually.

OBA educational efforts include:

Dozens of seminars and workshops each year.

Six schools of banking which are among the finest in the nation. These schools cover basic banking (offered in alternating years), compliance, consumer lending, operations, intermediate banking (two one-week sessions annually) and commercial lending.

Planning and coordinating the OBA Annual Convention and several other special events including the Annual Washington Visit, the Senior Management Conference, the Banking Leadership Oklahoma (BLOK), the Annual Golf Tournament and the Annual OBA Agriculture Conference.

In addition, the OBA education staff works with the Banking Leadership Oklahoma group in offering the annual OBA Summer Intern Program. Under this program, top students from the University of Oklahoma and Oklahoma State University spend their summers working at OBA-member banks while gaining college credit.

The OBA strives to tailor its educational offerings to the wide-ranging needs of Oklahoma bankers. Therefore, banker input and involvement plays a crucial role in program development. Bankers serve on a number of OBA boards and committees that work on development of schools and seminars.

# **OBA Communications/ Public Relations**

## ***Working to Inform Bankers and their Publics***

The OBA provides Oklahoma bankers timely and useful information about developments in the banking industry and also works to improve the public's understanding and support of banking. These efforts include:

***Oklahoma Banker* newspaper** — Published monthly for 2,000 bankers and other subscribers, the *Banker* offers news and features about Oklahoma banks and bankers, as well as articles and commentary about legislative, compliance and operational issues.

**The OBA Web Site** — Completely revamped in 2001 and constantly updated, the Web site — at [www.oba.com](http://www.oba.com) — includes information on compliance, government relations, OBA education programs and more. It also offers information to consumers on banking issues and personal finance.

***Oklahoma Banker Direct*** — These e-mail reports from the CEO on government relations developments and other industry happenings are issued as needed, making certain bankers are up to date on key issues.

**Media Relations** — The OBA staff responds to inquiries from the news media and, when appropriate, actively works with the media to inform the public about banking issues and events.

**Consumer Education** — Another major goal of the Association is arming consumers with the knowledge to make smart financial choices and protect themselves against fraud. The OBA makes consumer education kits available on several topics, including predatory lending, identity theft and investment decisions.

**Service Programs** — The OBA and its members are active in a number of service programs, such as America's Promise, a national program geared toward helping young people, and Bank on Tomorrow, a program developed by the OBA for Mothers Against Drunk Driving.

# **OBA Services Company**

## ***Leveraging the Combined Strength of Oklahoma Banks***

The OBA Services Company (OBASCO) works on many fronts, but all its efforts are directed toward one goal – to help Oklahoma banks succeed. The Services Company is a wholly owned subsidiary of the Oklahoma Bankers Association. It offers an array of products and services to banks and develops relationships with vendors for the benefit of the Oklahoma banking community. Ultimately, this translates into lower costs, higher revenues and improved operations for many banks.

OBASCO serves the state banking industry in the following areas:

*Publications and Other Information Services* – The Services Company publishes the *Oklahoma Banker*, a monthly newspaper that keeps the state’s bankers informed about their industry. Other OBASCO publications include the annual *Oklahoma Directory of Financial Institutions* and a wide array of legal and reference books.

OBASCO also offers information to banks the Association’s Internet site, [www.oba.com](http://www.oba.com)

*Products and Services* – In addition to publications, OBASCO offers such products as regulatory compliance matrices, training materials and videos, statement stuffers, holiday closing signs, software and the Thumbprint Signature anti-fraud program.

*Vendor Relationships and Discounts* – The Services Company looks for opportunities to leverage the collective buying power of Oklahoma banks to secure cost reductions from vendors on many products. For example, the OBA-Deluxe Corporation program enables OBA-member banks to receive discounts and rebates on customer check purchases. OBASCO also endorses products and services that help banks generate fee income, operate more efficiently and improve customer service.

The Services Company operates under a board of directors composed of bankers and the president of the Oklahoma Bankers Association. It continues to seek new opportunities to help OBA-member banks, and the staff prides itself on staying sensitive to the desires of Oklahoma bankers.

# **Oklahoma Bankers Foundation**

## ***Detering Crimes Against Oklahoma Banks***

The Oklahoma Bankers Foundation was created to oversee the voluntary contributions of OBA member banks for certain beneficial purposes. One of its main missions is to fund rewards dispensed through the OBA's Robbery Reward Program.

The Robbery Reward Program serves to discourage robberies and other crimes against Oklahoma banks and their employees. The Foundation furnishes rewards to citizens who provide law enforcement officials with information leading to the identification, arrest and/or conviction of persons suspected of committing crimes against Oklahoma banks.

The program covers robbery, burglary, larceny, kidnap-extortion, robbery of any customer on bank premises and felonious assault on any employee or customer on the premises. Through efforts of bankers across the state, the Robbery Reward Program has made a significant contribution toward deterring crimes against banks.

The Oklahoma Bankers Foundation also disburses funds for annual academic scholarships. Two students are selected each year to receive a \$1,000 scholarship. The foundation awarded its first scholarships in the spring of 1987.

The Oklahoma Bankers Foundation also supports the OBA Summer Intern Program. In addition, the foundation makes contributions to other organizations operating exclusively for charitable, benevolent and educational purposes.

# **OBA Strategic Memberships**

## ***Cost and Other Vital Information***

**Cost:** A strategic membership costs only \$750 annually (fiscal year Jan. 1-Dec. 31). Members joining after Dec. 1 will be assessed dues equal to one-half of the annual dues for the remainder of the fiscal year.

**Eligibility:** Any commercial bank with its principal place of business outside Oklahoma and which has no offices in this state, and any purveyor of goods or services to the banking industry, may become an strategic member of the OBA upon approval by a majority vote of the Board of Directors of the OBA and the payment of dues by such person or entity.

**Application:** All candidates for Strategic Membership should complete the enclosed application form. Applications are considered by the OBA Board of Directors during their regularly scheduled meetings. Upon application approval, the applicant will be notified immediately. To become an *OBA Strategic Member*, please return the enclosed application to:

**Strategic Membership  
Oklahoma Bankers Association  
643 NE 41st  
Oklahoma City, OK 73105**

Strategic Members must be re-approved by the Board annually.

**Restrictions:** No Strategic Member shall be entitled to vote on any issue presented to the OBA membership or any portion thereof. Any strategic member may be expelled from membership by a two-thirds vote of the Board of Directors. Cause for expulsion would include actions deemed by the OBA to be unprofessional and not in the best interests of the Oklahoma banking industry.

# Application

## For OBA Strategic Membership

### General Information (Please Print or Type):

Company: \_\_\_\_\_

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_

Fax: (\_\_\_\_) \_\_\_\_\_

E-mail: \_\_\_\_\_

Web: \_\_\_\_\_

Does this company have any common ownership with a bank? \_\_\_\_\_

If so, which bank(s). \_\_\_\_\_

### Type of Business and How Your Business Provides Goods/Services to Banks.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

State of Incorporation: \_\_\_\_\_ If not Oklahoma, is your business registered to do business in Oklahoma? \_\_\_\_\_

### Principal Officers:

Chairman: \_\_\_\_\_

Address: \_\_\_\_\_

President: \_\_\_\_\_

Address: \_\_\_\_\_

Exec. VP: \_\_\_\_\_

Address: \_\_\_\_\_

Sec./Treasurer: \_\_\_\_\_

Address: \_\_\_\_\_

Annual Revenues: \$ \_\_\_\_\_

### References:

Please list two OBA member banks that you have a vendor relationship with as references: (Board policy requires this information)

Bank: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Bank: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Today's Date: \_\_\_\_\_

Submitted by: \_\_\_\_\_

Signature: \_\_\_\_\_