

# 2021 Senior Management Forum



***Bellagio Resort Las Vegas – June 20-22, 2021***

# Schedule

## Sunday, June 20

6:00 p.m.

**Reception & Registration(dinner on your own)**  
Sponsor: [Verge Network Solutions](#)

## Monday, June 21

7:30-8:00 a.m.

**Networking Breakfast**  
Sponsor: [Crowe & Dunlevy Banking & Financial Institution Group](#)

8:15– 9:15 a.m.

**State of Cybersecurity**  
•Alyssa Pugh, CoNetrix – Lubbock

9:30– 10:45 a.m.

**Current Credit Trends, Credit Risk Management and the Impact on the Allowance for Loan Losses**  
•John Bourquard and Geron Morgan, BKD – OKC

10:45-11:00 a.m.

**morning break**  
Sponsor: [Fenimore, Kay, Harrison & Ford](#)

11:00-11:45 a.m.

**Taking the Right Kind of Risk**  
•Bart Smith, Performance Trust - Dallas

1 p.m.

**Golf Scramble at Reflection Bay Golf Club**

## Tuesday, June 22

7:45-8:15 a.m.

**Breakfast and Golf Prizes**

8:15-9:15 a.m.

**Legal/Regulatory Update:**  
•Joe Edwards and Joel Harmon, Crowe & Dunlevy – OKC

9:30-10:30 a.m.

**Balance Sheet Strategies**  
•Marc Gall, BOK Financial - Milwaukee

10:30 - 10:45 a.m.

**morning break**  
Sponsor: [McAfee & Taft](#)

10:45-Noon

**Rethinking the Strategic Plan**  
•Chet Fenimore, Fenimore, Kay, Harrison & Ford – Austin

\*Schedule subject to minor changes.



# Leadership Strategy Sessions

## The State of Cybersecurity

*Alyssa Pugh, CoNetrix – Lubbock*

Community banks have overcome many challenges in the last year, but the work is not done. From the introduction of remote work environments, to heightened risks of ransomware, to significant third-party incidents, and beyond, the current state of cybersecurity is one with both pressing and long-term considerations. With real-world examples from community bankers, this interactive session will include a discussion of key cybersecurity risks currently facing your bank; steps you can take to reduce your risk exposure; and practical tips for how you can leverage cybersecurity to grow your business.

## Current Credit Trends, Credit Risk Management and Impact on the Allowance for Loan Losses

*John Bourquard, BKD – OKC  
Geron Morgan, BKD – OKC*

The session will discuss current portfolio credit trends and recap the market impact and risk factors in the current environment of legislative and accounting changes.

## Taking the Right Kind of Risk

*Bart Smith, Performance Trust – Dallas*

Risk-taking is essential to value creation in any organization. Unfortunately, regulatory, accounting, and legislative constraints can often lead to risk aversion and weak long-term performance. In this session, Bart Smith will provide an update of upcoming rule changes and share insights on how bank managers can tackle these changes, take appropriate risk positions, and continue to generate optimal performance positions for their institutions.

## Legal/Regulatory Update

*Joel Harmon, Crowe & Dunlevy – OKC  
Joe Edwards, Crowe & Dunlevy – OKC*

Bankers continually face legal and regulatory challenges. This session will focus on the latest issues and concerns facing Oklahoma bankers.

## Balance Sheet Strategies for a Post Pandemic Environment

*Marc Gall, BOK Financial – Milwaukee*

With low interest rates, uncertain credit environment, significant increase in core deposits, it is difficult to plan ahead. How does your management team move from the paralysis of the unknown to developing a flexible plan that can change as conditions dictate?

### Key Takeaways/Themes

- Current economic conditions, rate expectations
- Identifying key performance objectives
- Considerations for interest rate risk modeling
- Tracking and planning liquidity position
- Opportunities in the investment portfolio

## Rethinking Your Bank's Strategic Plan During and After the COVID-19 Crisis

*Chet Fenimore, Fenimore, Kay, Harrison & Ford – Austin*

2020 was the year that no one saw coming. COVID-19 has tested every part of our strategic plans. It has stressed every component of the community bank business model. For these reasons, it is impossible to assume that everything can continue as they always have been. As you evaluate the future, the risk of complacency is significant. The marketplace is changing rapidly, and community banks must stay current with technology and continually update strategic plans to remain relevant. This presentation will highlight the strategic initiatives that all community banks should address in a post-COVID world.

## Reflection Bay Golf Club

Reflection Bay Golf Club is located in the luxurious high end resort residential community of Lake Las Vegas. Created in 1998, Reflection Bay Golf Club is designated as a prestigious Jack Nicklaus Signature Design course, the only such course located in the state of Nevada. Reflection Bay has hosted the Wendy's 3 Tour Challenge PGA event several times and has been the recipient of some of the most sought after awards by industry magazines including Golf Magazine and Golf Digest.





2021 SENIOR MANAGEMENT FORUM  
REGISTRATION FORM  
BELLAGIO HOTEL  
Las Vegas, NV

Early Bird Registration: Banker - \$700  
Guest - Complimentary

\* To qualify, you must enroll by May. 28, 2021.

Regular Registration: Banker - \$750  
Guest - Complimentary

\* Registration deadline is June 7, 2021.

Emerging Leaders Registration: Banker - \$475  
Guest - Complimentary

\* To qualify, you must be a member of the OBA's Emerging Leaders Program.

Name \_\_\_\_\_ Badge Name \_\_\_\_\_

Title \_\_\_\_\_

Bank Name \_\_\_\_\_

P.O. Box \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Cell \_\_\_\_\_

Email \_\_\_\_\_

Guest Name \_\_\_\_\_ Badge Name \_\_\_\_\_

RESERVATIONS

Room rates: June 19: \$199, June 20: \$109, June 21&22: \$139 (Resort fee: \$37 plus tax)

Reservations: Call the Bellagio at 1-888-987-6667.

\*\* To make online reservations please go to the link on the OBA website brochure.

\*\* Must identify you are with the Oklahoma Bankers Association Group: SOKL0621BE

\*\* Reservation deadline: May28, 2021

\*\*Hotel 3 Day Cancellation: Cancellations within 72 hours of scheduled arrival will be responsible for the room rate,

<https://book.passkey.com/go/oklahomabankersassociation2021>

GOLF

My handicap: \_\_\_\_\_ Guest Handicap: \_\_\_\_\_

*By contract, the OBA pays all tee times in advance. No refunds given if you sign up and choose not to play.  
Golf fees include green fees, lunch and transportation. Golf-related questions should be directed to  
tournament director, Adrian Beverage, at adrian@oba.com.*

**For questions about the conference, please contact Janis Reeser at janisr@oba.com or  
405-424-5252.**

(OVER)

REGISTRATION FORM CONTINUED

PAYMENT

Registration fee for Banker	\$ _____
Registration fee for Guest	\$ _____ 0 _____
Golf Fees:	
Golf \$225	\$ _____
Golf Club Rental \$75	\$ _____
<b>Total Registration Fee</b>	\$ _____

\_\_\_\_\_ Bill to my credit card  
           \_\_\_\_\_ Visa  
           \_\_\_\_\_ Mastercard  
 \_\_\_\_\_ My check is enclosed

Card Number \_\_\_\_\_  
 Expiration Date \_\_\_\_\_ CVC# \_\_\_\_\_

**Signature (required)** \_\_\_\_\_

REQUESTS FOR GOLF PAIRINGS

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

*Cancellation requests must be in writing and received by the close of business May 28, 2021. Cancellations submitted after May 28, 2021 are no longer eligible for refunds. However, substitutions can be made.*

Please mail registration forms and payment to:

Oklahoma Bankers Association  
 2021 Senior Management Forum  
 P.O. Box 960173  
 Oklahoma City, OK 73196-0173

**The OBA now has a secure fax line to be used for sending registration forms with credit card payments. For security reasons, if you pay by credit card, please fax your form to 405-604-9545 or secure e-mail: [secure@oba.com](mailto:secure@oba.com)**

# *Thank you to our sponsors!*

**Welcome Reception**  
*Verge Network Solutions*  
**Platinum Level**  
*Transfund*  
**Silver Level**  
*FHN Financial*  
*The Bankers Bank*  
**Bronze Level**  
*Eide Bailly, LLP*  
*NFP Executive Benefits*

## Conference Sponsors

**Monday Breakfast**      *Crowe & Dunlevy Banking & Financial Institution Group*  
**Monday Morning Break**      *Fenimore, Kay, Harrison & Ford*  
**Tuesday Morning Break**      *McAfee & Taft P.C.*

## Golf Sponsors

**Golf Transportation**      *FHLB Topeka*  
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**Golf Prizes**      *Country Club Bank Capital Markets Group*  
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## General Sponsor

*American Bankers Association*