

2024 Senior Management Forum



Waldorf Astoria, Las Vegas – April 7-9, 2024

Schedule

Sunday, April 7

6:00-7:00 p.m.

Reception & Registration(dinner on your own)
Sponsor: [Performance Trust Capital](#)

Monday, April 8

7:30-8:00 a.m.

Networking Breakfast
Sponsor: [Crowe & Dunlevy](#)

8:00-8:05 a.m.

Welcome/Announcements

8:05-9:00 a.m.

It's All Covid's Fault
•Steve Wyett, BOK

9:10-9:50 a.m.

Fraud Trends
•Angela Morelock, FORVIS

9:50-10:00 a.m.

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

10:00-10-50 a.m.

Stacking the Deck in Your Favor: Secrets of High Performing Banks
•Preston Afrank, Haberfeld

11:00-11:50 a.m.

Regulatory Update
•Kari Hoffhines and Zane Anderson, Crowe & Dunlevy

1:00 p.m.

TPC Las Vegas Scramble Golf Tournament

Tuesday, April 9

7:30-8:00 a.m.

Networking Breakfast
Sponsor: [FHN Financial](#)

8:00-8:10 a.m.

Announcements/Golf Prizes

8:10-9:00 a.m.

Strategic Planning for Community Banks
•Miles Pringle, The Bankers Bank

9:05-10:00 a.m.

Emerging Cybersecurity Threats and Risks
•Ron Hulshizer, BankOnIT

10:00-10:10 a.m.

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

10:10-11:00 a.m.

Changing Banking Landscape and its Impact on Balance Sheet Strategy
•Steve Twersky, FHN

11:05-11:50 a.m.

The Coming Storm
•Jason Elder, Performance Trust

Waldorf Astoria

Waldorf Astoria Las Vegas offers extraordinary experiences in the heart of one of the world's most vibrant cities, where spectacular views from every space are rivalled only by the glittering skyline. Explore a range of outstanding dining experiences by celebrated chefs and a sprawling spa, where relaxation and rejuvenation take center stage. Expect floor-to-ceiling windows, city strip views, spa-soaking tubs, and sophisticated amenities in every room and suite.



Leadership Strategy Sessions

It's All Covid's Fault

Steve Wyatt, BOK, Tulsa

The session will address economic outlook/monetary and fiscal policy implications/ inflation rates and more. Discussion will provide a complete lack of clarity on what the future holds!

Fraud Trends

*Angela Morelock, FORVIS Managing Partner/
Forensics & Valuation, Springfield*

Fraud continues to challenge banks. What are the trends? What are steps to mitigate risks? What fraud indicators should grab your immediate attention? These questions and more will be addressed during this enlightening session.

Stacking the Deck in Your Favor: Secrets of High-Performing Banks

Preston Afrank, EVP Haberfeld, Lincoln

What do high-performing banks do differently? Where do they focus? Preston will analyze how high-performing banks compare to the industry overall, the key contributors and several strategies available to all community banks to drive improved results.

Regulatory Update

*Kari Hoffhines and Zane Anderson
Crowe & Dunlevy, OKC*

A presentation about recent regulatory developments of concern and current litigation trends that present liability for banks with steps to avoid liabilities. Update on current lending and documentation issues and best practices to follow.

Strategic Planning at Your Bank

*Miles Pringle, EVP & General Counsel
The Bankers Bank, OKC*

Find out what makes a good strategic plan. What information should (and should not) be in the plan? What do the regulations require? Most of all, what does your bank need to do to create an effective plan?

Emerging Cybersecurity Threats and Risks

Ron Hulshizer, BankOnIT, OKC

Discussion will include emerging cybersecurity threats and risk along with mitigation solutions to help community banks reduce the risk. Key takeaways include: awareness of the latest risks, compliance considerations, and possible solutions to reduce risk.

The Changing Banking Landscape and Its Impact on Balance Sheet Strategy

*Steve Twersky, Senior Executive Vice President,
FHN Financial, Memphis*

The banking industry faced a unique set of challenges over the past three years. The session will address a range of topics including the outlook for loan and deposit growth, bank valuation and what current market expectations can tell us about the future, along with the role of the securities portfolio and how it can be used as a ballast in an uncertain environment.

The Coming Storm

*Jason Elder, Partner and Managing Director,
Performance Trust, Chicago*

Funding costs skyrocketed in the early part of 2023. Many banks are now facing NIM and earnings challenges, but it could be the tip of the iceberg. New analysis suggests more than 25% of U.S. banks could become unprofitable over the next 12-18 months, and many are unaware. To understand the gravity and scale of this problem, we need to re-examine what we think we know about our Cost of Funds in the current environment and why nearly all bank's earnings projections are missing this. A different approach reveals the hidden truth.

TPC Las Vegas

Since opening in 1996, the TPC Las Vegas golf course (previously TPC at The Canyons) has some of the richest PGA TOUR history in all of Las Vegas. The TPC Las Vegas golf course offers an incomparable level of play and challenge for every skill set. The club's par-71, 7,016-yard championship golf course designed by acclaimed architect Bobby Weed and World Golf Hall of Famer Raymond Floyd, is commonly referred to as "desert elegance."

TPC Las Vegas is one of the few Las Vegas golf courses which offers the option for men and women to play the course from a blended tee yardage.

*schedule/topics subject to minor changes





2024 SENIOR MANAGEMENT FORUM REGISTRATION FORM WALDORF ASTORIA

Las Vegas
April 7-9, 2024

Early Bird Registration: Banker - \$725
Guest - **Complimentary**

* To qualify, you must enroll by February 29, 2024.

Regular Registration: Banker - \$775
Guest - **Complimentary**

* Registration deadline is March 15, 2024.

Emerging Leaders Registration: Banker - \$500
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: April 6-9: \$339

Reservations: Call 1-877-214-6773

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

**** Must identify you are with the Oklahoma Bankers Association Group:1OBA24**

**** Reservation deadline: Friday, March 18, 2024**

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

•Note: Rate does not include applicable taxes and \$39 plus tax daily resort fee.

<https://book.passkey.com/go/1OBA24>

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 \$290 \$ _____
 Golf Club Rental \$80 \$ _____

Total Registration Fee \$ _____

_____ 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 March 8, 2024. Cancellations submitted after March 8, 2024 are no longer eligible for refunds. However, substitutions can be made.

Please mail registration forms and payment to:

Oklahoma Bankers Association
 2024 Senior Management Forum
 P.O. Box 960173
 Oklahoma City, OK 73196-0173

**The OBA has a secure email to be used for sending registration forms with credit card payments.
 If you pay by credit card, please send to secure e-mail:
 secure@oba.com**

Thank you to our sponsors!

Welcome Reception
Performance Trust Capital

Platinum Level

Transfund

Silver Level

BOK Financial Securities, Inc.

Profit Resources, Inc

The Bankers Bank

Bronze Level

Benchmark Operations, LLC

Cornerstone Advisors

Conference Sponsors

Hotel Welcome Letters

available

Monday Breakfast

Crowe & Dunlevy Banking

Monday Morning Break

McAfee & Taft

Tuesday Breakfast

FHN Financial

Tuesday Morning Break

Fenimore, Kay, Harrison

Golf Sponsors

Golf Transportation

Wichita National Life Insurance Company

Box Lunches

Eide Bailly LLP

Beverage Cart

FORVIS

Specialty Golf Hole Prize Sponsor

available

Hole In One

PNC Capital Markets

Golf Tournament Champion sponsor

United Bankers Life & Casualty Reinsurance
Company

General Sponsors

American Bankers Association

NFP Executive Benefits

*Sponsors as of January 29 2024. Additional sponsorships are still available.
Contact Thi Pham at thi@oba.com for more information!*