

2026 Senior Management Forum



Renaissance Esmeralda Resort, Palm Springs - March 29-31, 2026



Schedule

Sunday, March 29

6:00-7:00 p.m.

Reception & Registration (dinner on your own)
Sponsor: [BankOnIT](#)

Monday, March 30

7:30-8:00 a.m.

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

8:00 a.m.

Welcome/Announcements

8:05-9:05 a.m.

The Zen of Banking
•Joe Sullivan, Market Insights, Seattle

9:10-10:00 a.m.

Elevating Banking Through Technology & Talent
•Andrea Carter and Miles Pringle, TBB, OKC

10:00-10:10 a.m.

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

10:10-11:00 a.m.

Crypto Asset Safekeeping
•Nik Fahrner, Forvis Mazars, Colorado Springs

11:05-11:45 a.m.

Regulatory Update
•Joel Harmon, Crowe & Dunlevy, OKC

1:00 p.m.

Golf Scramble, Indian Wells Golf Resort

Tuesday, March 31

7:30-8:00 a.m.

Networking Breakfast

8:00-8:10 a.m.

Announcements/Golf Prizes

8:10-9:05 a.m.

Challenges and Opportunities: An Apolitical View of the Economy in 2026
•Steve Wyatt, BOK, Tulsa

9:15-10:05 a.m.

Legal Trends for the Future
•Charlie Floyd, McAfee & Taft, OKC

10:05-10:15 a.m.

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

10:15-11:05 a.m.

AI in Financial Services: Are you Ready?
•Elia Blankenship, RSM, Los Angeles

11:10-Noon

The Total Bank Makeover: A Proven Plan for Growth & Profitability
•Dr. Sean Payant, Haberfeld, Lincoln

**Renaissance
Esmeralda**

Located at the base of the Santa Rosa Mountains in the exclusive community of Indian Wells in the Coachella Valley. Spa Esmeralda offers 19 treatment rooms, desert inspired therapies, and a Spa Garden to enjoy the warm desert sun and the soothing sounds of cascading water. Indian Wells Golf Resort offers 2 signature-designed championship gold courses and the Callaway Golf Performance Center. The resort is less than 20 miles from Palm Springs airport.



Leadership Strategy Sessions

The Zen of Banking

*Joe Sullivan
Market Insights, Seattle*

In this motivational keynote, Joe Sullivan explores how the principles of Zen—balance, simplicity, and adaptability—are becoming crucial in navigating this evolving banking landscape. From the seamless integration of digital technologies to fostering deeper connections with customers, we'll discuss how embracing a more mindful and holistic approach to banking can lead to greater innovation, resilience, and renewed focus on what truly matters.

Elevating Banking Through Technology and Talent

*Andrea Carter and Miles Pringle
The Bankers Bank, OKC*

In today's rapidly evolving financial landscape, banks face a dual challenge: staying ahead of technological innovation while attracting and retaining top-tier talent. This presentation explores how financial institutions can rise to meet both demands—not by chasing every shiny new tool, but by strategically leveraging the technology they already possess, evaluating emerging solutions, and integrating them seamlessly with their workforce.

Crypto Asset Safekeeping

*Nik Fahrer
Forvis Mazars, Colorado Springs*

This session will explore the fundamental components of blockchain infrastructure: digital wallets for asset management, the underlying cryptographic keys that secure them, and the automated smart contracts that govern decentralized transactions. Benefits, risks and challenges, and future trends will be discussed.

Regulatory Update

*Joel Harmon
Crowe & Dunlevy, Oklahoma City*

This annual update will focus on changes under the Trump administration, current regulatory actions and trends (CFPB, FDIC, etc.), and FinCen developments. In addition, current status of Fair Lending and lending discrimination actions will be addressed.

Challenges and Opportunities: An Apolitical View of the Economy in 2026

*Steve Wyatt
Bank of Oklahoma, Tulsa*

The history of our economy is its ability to overcome challenges in a way which moves us forward. Let's discuss the good, the bad, and the ugly and why we remain more optimistic than pessimistic as we think about 2026. Financials have stated the year from a position of strength as the outlook for economic growth improves, the yield curve steepens, and the credit environment remains relatively benign. What could possibly go wrong?"

Legal Trends for the Future: Crypto Payments, Fintech Charters, Compliance Costs and M&A

*Charlie Floyd
McAfee & Taft, OKC*

Navigating the complex and evolving landscape of fintech, crypto payments, and compliance costs are challenges facing today's community bankers. Legal issues and related risks will be explored.

AI in Financial Services: Are you Ready?

*Elia Blankenship
RSM, Los Angeles*

Artificial Intelligence (AI) relates to a range of emerging digital technologies being used across the financial services industry, including big data, open system integration, robotic and intelligent process automation (RPA and IPA). As it continues to evolve, how can AI impact your customer and employee experiences? Are there areas within my current processes that could leverage this technology? Frictionless processing, third party partnerships, data needs — just some topics this will cover during the session, along with the associated risk to your organization.

The Total Bank Makeover: A Proven Plan for Growth and Profitability

*Dr. Sean Payant
Haberfeld, Lincoln*

Does your financial institution need a "total banking makeover"? If your organization is struggling to grow new retail and business customer relationships, you just might! Are you looking to add younger generations of customers? Are you interested in learning how, why, and when people switch financial institutions as well as how to capture more of the switch? When growth isn't happening, it isn't simply a "marketing problem." In this thought-provoking closing session, we'll explore all the changes that need to be made to give your bank a "growth" makeover.





**2026 SENIOR MANAGEMENT FORUM
REGISTRATION FORM
RENAISSANCE ESERALDA RESORT & SPA
Indian Wells, CA
March 29-31, 2026**

Early Bird Registration: Banker - **\$750**
Guest - **Complimentary**

* To qualify, you must enroll by February 20, 2026.

Regular Registration: Banker - **\$800**
Guest - **Complimentary**

* Registration deadline is March 5, 2026.

Emerging Leaders Registration: Banker - **\$550**
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: **March 28-April 1: \$349**

Reservations: Call **1-888-236-2427**

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

**** Reservation deadline: Friday, March 8, 2026**

****Hotel 3 Day Cancellation: Cancellations within 72 hours of scheduled arrival deposit will be refunded .**

•Note: Rate does not include applicable taxes and \$20 plus tax daily resort fee.

<https://book.passkey.com/go/OB26>

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, and lunch. 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 janis@oba.com or
405-424-5252.**

(OVER)

REGISTRATION FORM CONTINUED

PAYMENT

Registration fee for Banker \$ _____
 Registration fee for Guest \$ _____ 0 _____
 Golf Fees:
 Golf \$310 \$ _____
 Golf Club Rental \$90 \$ _____

Total Registration Fee \$ _____

_____ Bill to my credit card Card Number _____
 _____ Visa Expiration Date _____ CVC# _____
 _____ Mastercard
 _____ My check is enclosed

Signature (required) _____

REQUESTS FOR GOLF PAIRINGS

Cancellation requests must be in writing and received by the close of business March 7, 2026. Cancellations submitted after March 7, 2026 are no longer eligible for refunds. However, substitutions can be made.

Please mail registration forms and payment to:

Oklahoma Bankers Association
 2026 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

BankOnIT

Platinum Level

Transfund

Gold Level

Oklahoma State Banking Department

Bronze Level

The Bankers Bank

FHLB Topeka

Integrus

NBID, LLC

NFP

PRI

Conference Sponsors

Monday Breakfast

Crowe & Dunlevy

Monday Morning Break

McAfee & Taft

Tuesday Morning Break

Fenimore, Kay, Harrison

Golf Sponsors

Tournament Champion

United Bankers Life & Casualty

Beverage Cart

Forvis Mazars

Golf Lunch

Eide Bailly

Golf Score Card

Haberfeld

Closest to the Pin

Banc Card

Sponsors as of January 12, 2026

Additional sponsorships are still available. Contact Thi Pham at thi@oba.com for more information!