

2024 Basic Banking School



SEPTEMBER 16-19 | OBA/HARRIS EVENT CENTER
643 NE 41ST STREET, OKLAHOMA CITY 73105



Purpose & Philosophy

This is the 32nd 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 & Admission 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 member banks accepted next. So that students may gain the most from the course of instruction and group environment, enrollment is limited to 50 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 on Thursday, Sept. 19. An attendance record will be kept and the 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 exam at the end of the school. Each student's test score will be made available at the close of the school.

Accommodations

The Oklahoma Bankers Association has a block of rooms available at the Residence Inn by Marriott OKC Downtown. The hotel is located at 400 E Reno Ave, Oklahoma City, OK 73104. Please call 405-601-1700 and mention the Oklahoma Bankers Association Basic Banking School room block. The \$120 room rate includes breakfast and parking. Reservations should be made by Monday Sept. 2 to guarantee this rate.

Scholarship

The student who has the highest score on the final exam will receive a \$400 scholarship to the OBA Intermediate Banking School. The scholarship must be used within two years and is not transferable.

Dress

Dress for class is informal, but in good taste. Tailored shorts and jeans are acceptable. Plan to bring a light sweater or jacket.

Registration

Students will register at the Oklahoma Bankers Association's Harris Event Center from 9:00-9:30 a.m. on Monday, September 16, 2024.

The Bottom Line

See below for registration fees. This covers all expenses for lunch each day, a one-year subscription to the *Oklahoma Banker* newspaper, books and tuition. Fee must accompany this application. Registration deadline is Aug. 30, 2024. Upon cancellation by Aug. 30, the full fee will be returned to the bank. A \$600 fee will be retained if cancellations are made after Aug. 30 through Sept. 6. Cancellations received after Sept. 6 will be subject to forfeiture of fees. All cancellations must be in writing.

EARLY BIRD REGISTRATION: Any registrant enrolling prior to Aug. 16, 2024, will be afforded the following discounted rate: \$1,200 OBA members.

MULTIPLE REGISTRATIONS: Any OBA-member bank enrolling two or more students will be afforded the following discounted rate: \$1,200 first student and \$1,100 each additional student.

REGULAR REGISTRATION: Single registration fee after Aug. 16: \$1,250 OBA member
\$2,500 Non-members

School Board

Chairman:

Kendra Barnes, Arvest Bank, Oklahoma City

Members:

Adam Anderson, Bank of Commerce, Catoosa
Katie Barnard, BancFirst, Sulphur
Brandon Bixler, NBC, Oklahoma City
Harry Brown, First Enterprise Bank, Oklahoma City
Nancy Cantu, Bank of Commerce, Chickasha
Jerika Coffman, Quail Creek Bank, Oklahoma City
Christopher Ford, Elevate Bank, Sedan
Donna Hoffman, First Fidelity Bank, Oklahoma City

Tim Holt, Union State Bank, Edmond
Valerie Jury, First Fidelity Bank, Oklahoma City
Keith Kersten, First Enterprise Bank, Oklahoma City
Sam McCord, The Exchange Bank, Skiatook
Jerold Phillips, Citizens Bank & Trust, Ardmore
Kevin Pourrahman, NBC, Oklahoma City
Sydney Tolbert, First National Bank, Ardmore
Melissa Turner, Sovereign Bank, Oklahoma City
David Vinall, BancFirst, Lawton



2024 BASIC BANKING SCHOOL

APPLICATION FOR ADMISSION

SEPT. 16-19, 2024

A check payable to the Oklahoma Bankers Association must accompany this application. This fee covers instruction, materials, tuition, refreshment breaks, lunch and a one-year subscription to *Oklahoma Banker*. The registration deadline is Aug. 30, 2024.

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

REGISTRATION

Early Bird Registration

To qualify, you must enroll by August 16, 2024.

\$1,200 OBA Members

Multiple Registrations

To qualify, students must be from the same bank. (OBA Members)

\$1,200 First student

\$1,100 Each additional student

Regular Registration

After August 16, 2024

\$1,250 OBA Members

\$2500 Non-OBA Members

See brochure for cancellation policy.

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

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 and 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)

EMAIL ADDRESS

DATE OF BIRTH (MONTH/DAY/YEAR)

AGE

BUSINESS PHONE

MOBILE PHONE

YOUR TITLE

BANK NAME

POST OFFICE BOX

CITY

STATE

ZIP

Application must be returned by August 30, 2024.

(OVER)

APPLICANT'S TITLE

SIZE OF BANK IN DEPOSITS

SIZE OF BANK IN ASSETS

TOTAL YEARS IN BANKING

(Check only one)

- 1. ___ President/CEO
- 2. ___ Executive VP/Sr. VP
- 3. ___ Vice Pres./Cashier
- 4. ___ Asst. VP/Asst. Cashier
- 5. ___ VP/Loan Officer
- 6. ___ Asst. VP/Loan Officer
- 7. ___ Compliance Officer
- 8. ___ Auditor
- 9. ___ Admin. Asst./Secy.
- 10. ___ Loan Review
- 11. ___ Other (Specify) _____

- 1. ___ \$0-100mm
- 2. ___ \$100-250mm
- 3. ___ \$250mm-500mm
- 4. ___ \$500-750mm
- 5. ___ \$750mm-1 billion
- 6. ___ over 1 billion
- 7. ___ Bank Holding Co.
- 8. ___ Other

- 1. ___ \$0-100mm
- 2. ___ \$100-250mm
- 3. ___ \$250mm-500mm
- 4. ___ \$500-750mm
- 5. ___ \$750mm-1 billion
- 6. ___ over 1 billion
- 7. ___ Bank Holding Co.
- 8. ___ Other

- 1. ___ Less than 1
- 2. ___ 1-3 years
- 3. ___ 3-5 years
- 4. ___ 5-10 years
- 5. ___ 10-15 years
- 6. ___ 15 years & over

EDUCATIONAL BACKGROUND

OBA SCHOOLS ATTENDED

YEAR

(Check only one)

- 1. ___ High School Graduate
- 2. ___ Some College (Hrs _____)
- 3. ___ Associate Degree
- 4. ___ Bachelor's-Business
- 5. ___ Bachelor's-Other
- 6. ___ Masters-Business
- 7. ___ Masters-Other
- 8. ___ Ph.D.
- 9. ___ Law Degree

- 1. ___ Compliance _____
- 2. ___ Consumer Lending _____
- 3. ___ Operations _____
- 4. ___ Commercial Lending _____
- 5. ___ Intermediate _____
- 6. ___ Basic _____
- 7. ___ Other _____

BUSINESS EXPERIENCE

List in chronological order your banking and other business experience. Include dates, bank and 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 | MOBILE PHONE |
| RELATIONSHIP | WORK PHONE | |

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

Oklahoma Bankers Association
P.O. Box #960173
Oklahoma City, OK 73196-0173

Contact Janis or Nancy for further information at 405-424-5252 or at janisr@oba.com.

FOR OBA USE ONLY

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|-------|-----|----|------|---|---|---|
| Rec'd | Rt# | By | Amt. | # | k | C |
|-------|-----|----|------|---|---|---|

2024 Basic Banking School

| Monday, Sept 16 | Tuesday, Sept 17 | Wednesday, Sept 18 | Thursday, Sept 19 | |
|---|---|---|--|---|
| <p>9:00 – 9:30 Registration</p> <p>9:30 – 10:00 School Introduction & Ice Breaker</p> <p>10:00 – 11:00 History of Banking</p> | <p>9:00 – 10:00 The Federal Reserve</p> | <p>9:00 – 9:45 Let's Get Social</p> | <p>9:00 – 10:00 Exam</p> <p>10:00 – 10:30 OBA Update</p> | |
| <p>Break 11:00 – 11:15</p> <p>11:15 – 12:45 Bank Operations Overview</p> | <p>Break 10:00 – 10:15</p> <p>10:15 – 12:15 Current Compliance Issues</p> | <p>Break 9:45 – 10:00</p> <p>10:00 – 10:15 Group Photo</p> <p>10:15 – 11:30 Bank Accounting</p> | <p>10:30 – 11:00 Exam Summary Adjourment</p> | |
| <p>Lunch 12:45 – 1:15 Sponsor: The Bankers Bank</p> <p>1:15 – 2:00 Cryptocurrency Overview/Payments Update</p> <p>2:15 – 3:45 Internal Controls/Ethics/Conflicts of Interest</p> | <p>Lunch 12:15 – 12:45</p> <p>12:45 – 1:15 FDIC Insurance Lending</p> <p>1:20 – 3:30 Lending</p> | <p>Lunch 11:30 – 12:00</p> <p>12:00 – 1:00 Bank Accounting continued</p> <p>1:10 – 2:30 Security, Fraud, Cybersecurity</p> | | |
| <p>Break 3:45 – 4:00</p> <p>4:00 – 5:15 Human Resources</p> | <p>Break 3:30 – 3:45</p> <p>3:45 – 4:45 Effective Communication Skills/ Customer Service Exam Review</p> <p>4:45 Exam Review</p> | <p>Break 2:30 – 2:45</p> <p>2:45 – 4:15 Security, Fraud, Cybersecurity continued</p> <p>4:20 Exam Review</p> | | |
| <p>Dinner on your own</p> | <p>Dinner on your own</p> | <p>Dinner on your own</p> | | <p><i>Schedule subject to minor changes</i></p> <p>7/2/2024</p> |