

Oklahoma Bankers Association

Board Orientation – Aug. 22, 2024

Six Core Functions of the OBA

OBASCO

OBA Financial Services

**OBA Insurance Agency
(OBAIA)**

**OBA Services Company
(OBASCO)**

OBAIA and Texas Bankers Association

- Judy Hanna continues to serve OBA Member banks with
 - More Companies
 - More Choices
 - Better Prices
 - Outstanding Service

OBASCO

- **Strategic Members:** Typically held by accounting firms, consultants, vendors and insurance companies that directly provide services or products to OBA member banks.
- **Endorsed Vendors:** A select group of providers that have entered into a written contract with the OBA. These companies will provide revenue-sharing with the OBA and prices and/or conditions more advantageous to OBA members than would otherwise be available without the OBA endorsement.

Education & Training

- Schools
- Seminars
- Webinars

Fraud Department

- **Assist customers when fraud happens**
 - **Educate employees and customers**
- **Alerts on robberies, counterfeits, scams**
 - **Robbery Reward Program**
- **Works with law enforcement and government agencies**

Advocacy

- **Support legislative and regulatory proposals that enhance profitability**
- **Oppose legislative and regulatory proposals that add direct and indirect costs.**

•OBA Legislative Process

- OBA staff will read all legislation and determine which bills are applicable to our industry.
- Government Relations Council will meet and discuss all pertinent bills and take a position. This position is a recommendation to the OBA Board.
 - The OBA Board will accept or reject the position recommended by the G.RC

Legal and Compliance

- **Access to banking-specific lawyers, compliance experts at no cost**
 - **Reduce legal and compliance costs**
 - **Enhances your bottom line**

Public/Member Relations

- THE information resource for bankers and their customers
 - The voice of Oklahoma's banking industry
- Telling the “good news” about banking
- Emerging Leaders program/academy

Oklahoma Banker newspaper

- One of only two state bankers associations with a true newspaper, allowing for quick turnaround time to get news out while fresh.
- Circulates nearly 2,000 copies monthly.

Oklahoma Bankers Association

- Board of Directors
 - 18 Elected Bankers
- Two Chairman's Appointments
 - Four Elected Officers
- Chair – Emerging Leaders

- OBA Staff
 - Adrian Beverage, President/CEO (24 years)
 - Lea Ann Jackson, COO,CFO (30 years)
 - Janis Reeser. EVP Education (40 years)
 - Jeremy Cowen, SVP Communications (22 years)
 - Sharon Lewis, VP Fraud Division (7 months)
- Megan McGuire, VP Government and Member Relations (9 years)
 - Kathryn Donovan, Director of Accounting (6 years)
 - Joan Anderson, Special Projects Manager (13 years)
- Debbie Leake, Conference/Meeting Coordinator (24 years)
 - Nancy McKinnis, Education Assistant (29 years)
- Thi Pham, Vendor Relations & Products Coordinator (7 years)
 - Niki Taylor, Receptionist (3 year)
 - Sheila Wyatt, Database Administrator (8 years)

215 years of experience at the OBA!!!

Oklahoma Bankers association

Questions?