

25 BANK DIRECTOR SYMPOSIUM

MARCH 25 | OBA/OKC

OBA MEMBERS: REGISTER ONLINE AT WWW.OBA.COM.

1-4 Directors _____@**\$280** each

4 or more Directors _____@**\$260** each

CEO/Executive Officer _____@**260** (attending w/1 or more directors)

Non-member _____@**\$600** each

The fee includes instruction, materials, breaks and lunch.

Cancellation requests must be made in writing and be received by March 11 to receive a full refund. A 50-percent refund will be given on all cancellations received by March 18. No refunds will be given on requests received after March 18 however, substitutions may be made.

BANK/CO. _____

PHONE _____

FAX _____

P.O. BOX _____ CITY _____

ZIP _____

NAME _____

TITLE _____

EMAIL _____

NAME _____

TITLE _____

EMAIL _____

NAME _____

TITLE _____

EMAIL _____

PAY BY CREDIT CARD:

For security reasons, please e-mail your registration form and credit card information to:

secure e-mail: secure@oba.com

BILL TO VISA MASTERCARD AMEX DISCOVER

CARDHOLDER NAME _____

CARD # _____

EXPIRATION DATE _____ CVC# _____

SIGNATURE _____

PAY BY CHECK:

Mail this form with payment to:

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

SCHEDULE

8:30 a.m. Registration

9 a.m. to 4 p.m. Program

LOCATION

Harris Event Center at the OBA
643 N.E. 41st St., Oklahoma City
405-424-5252

ACCOMMODATIONS

Residence Inn Bricktown
400 E. Reno Ave.
Oklahoma City, OK 73104
405-601-1700
dial Option 0
for OBA rate of **\$122**,
Free breakfast, Self parking **\$18/day**.

Embassy Suites, OKC Medical Center
741 N Phillips Ave
405-239-3900
Ask for the OBA business rate of **\$159**
Made to order breakfast, Self parking **\$14/day**
Hotel Prices Subject to Change

QUESTIONS?

Call Nancy, Debbie or Janis at the OBA for further information at 405-424-5252, or email Janis at janisr@oba.com.

If you have a disability that may impact your participation in this event, please forward a statement regarding any special needs to the OBA. We will contact you to discuss accommodations.



2025 Bank Director Symposium



MARCH 25, 2025
HARRIS EVENT CENTER/OBA
643 NE 41ST STREET
OKLAHOMA CITY, OK 73105

THANK YOU TO OUR PLATINUM SPONSOR:
THE OKLAHOMA STATE BANKING DEPARTMENT



SCHEDULE

8:30 – 9:00 am
Registration, Continental Breakfast and Opening Remarks
Eric Nelson, President, KPN Consulting

9:00 – 10:00 am
Building a Culture that Fosters Curiosity
Anne Schutt, VP of Business Development, Midwestern Trading Securities Company
 Eleanor Roosevelt famously said, “Life must be lived, and curiosity kept alive. One must never, for whatever reason, turn his back on life.” Why is curiosity so important in the workplace? In a Harvard Business Review of 3000 employees, 92% felt that curiosity was a catalyst for job satisfaction, motivation, innovation, and high performance, yet only 24% felt curious at work. In this session, we will help you learn to identify and remove barriers you may have in place that are preventing a curiosity culture so that you can retain and attract talent to your organization.

10:05 – 11:05 am
As a Bank Leader, Understand How to Get More Out of Your Technology Vendors
Charlie Kelly, Partner, Remedy Consulting
 Bank leaders are constantly looking for ways to improve your business performance, customer satisfaction, and regulatory compliance. One of the key factors that can help you achieve these goals is your technology vendors. Technology vendors provide you with the software, hardware, and services that enable your bank to operate efficiently, securely, and innovatively. However, not all vendors are created equal, and not all vendor relationships are optimal. In this presentation, we will discuss how you can get more out of your technology vendors by understanding the landscape and following some best practices for vendor selection, management, and evaluation.

11:05-11:20 am
Networking Break/Refreshment Break

11:20 – 12:20 pm
Succession Planning for Bank Management, Directors & Shareholders
Robert Flowers, Partner, Bradley
 Banking industry regulators consider proactive succession planning and management a key governance tool in promoting a bank’s resilience in difficult times. Hear latest strategies for management and board succession and retention, as well as ownership transition options to ensure you can remain independent.

12:30 – 1:00 pm Lunch
Lunch sponsored by the Oklahoma State Banking Department

1:00 – 2:00 pm
Asset/Liability Management in Today’s Environment
Dale Sheller, Managing Director – The Baker Group
 Nearly three years ago, the Federal Reserve embarked on an aggressive tightening cycle to rein in inflation following the global pandemic. As we start 2025, the economy and the banking industry face renewed uncertainties, fueled by the recent election and more anticipated rate cuts by the Fed during the year. Senior management continues to navigate an environment marked by elevated interest rates and the looming threat of an economic downturn. This session will examine and discuss all these concerns and present strategies to better prepare your institution for the uncertainty ahead.

2:00 – 2:10 pm
Networking/Refreshment Break

2:10 – 3:10 pm
One Size Does Not Fit All: Bank Balance Sheets Vary, So Should Their Strategies
Chuck McBrayer, Managing Director, Northern Texas & Oklahoma, IntraFi
 How can you optimize your balance sheet to achieve your organization’s unique strategic goals? Glean ideas from examples showing how several different banks—each with a different mix of assets and liabilities, liquidity position and capitalization needs—can use flexible deposit pricing and funding tactics to address the challenges of today’s economic environment and empower your organization to thrive now and in the future.

3:15 – 4:00 pm
Regulatory Panel – Conversations with Your Regulators
Moderated by: Eric Nelson, President, KPN Consulting
 This session will provide an informal setting for participants to hear what is on regulators' minds and share experiences and insights as a community bank board member. Members of the Federal Reserve, OCC, and State will highlight emerging issues, answer participant's questions, and discuss topics raised by participants. The session structure will include prepared remarks, as well as an open forum for questions and discussion.
 • *Doug Gray, AVP, Federal Reserve Bank of Kansas City*
 • *Amanda Arnett, Assistant Deputy Comptroller, OCC*
 • *Dudley Gilbert, Deputy Commissioner, Oklahoma State Banking Department*

4:00 pm
Concluding Remarks and Adjourn
Moderated by: Eric Nelson, President, KPN Consulting

REGISTRATION

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WHO SHOULD ATTEND

The 2025 Bank Directors’ Symposium is a must attend for all Directors and CEOs with a special focus on the banking industry’s current and future outlook. The objective of this symposium is to provide updates on topics including regulatory expectations, vendor management, succession planning, talent acquisition, ALCO and other critical areas for a bank’s success.