

# 2025 Senior Management Forum



***Renaissance Esmeralda Resort, Palm Springs - April 6-8, 2025***



# Schedule

## Sunday, April 6

6:00-7:00 p.m.

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

## Monday, April 7

7:30-8:00 a.m.

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

8:00 a.m.

**Welcome/Announcements**

8:05-9:05 a.m.

**Economic Outlook**  
•Steve Wyatt, BOK

9:15-9:50 a.m.

**FHLB-Post Election**  
•Drew Simmons, FHLB

9:50-10:00 a.m.

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

10:00-10:50 a.m.

**A Winning Strategy**  
•Robert Mendez, BankOnIT USA

11:00-11:50 a.m.

**Wire & Check Fraud: Recent Cases and Best Practices**  
•Joel Harmon and Zane Anderson, Crowe & Dunlevy

1:00 p.m.

**Golf Scramble, Indian Wells Golf Resort**

## Tuesday, April 8

7:30-8:00 a.m.

**Networking Breakfast**

8:00-8:10 a.m.

**Announcements/Golf Prizes**

8:10-9:10 a.m.

**Strategic Staffing for Community Banks**  
•Miles Pringle, The Bankers Bank

9:15-10:00 a.m.

**Examiner Hot Spots and Regulatory Concerns**  
•Lori Jackson, Forvis Mazars

10:00-10:10 a.m.

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

10:10-11:00 a.m.

**New FDIC Third-Party Risk Management Guide: A Deep Dive**  
•Brendtly Lauck, Eide Bailly

11:05-11:55 a.m.

**2025 Community Bank Outlook**  
•Chet Fenimore, Fenimore Kay Harrison

**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

## Economic Outlook

*Steve Wyatt,  
Bank of Oklahoma, Tulsa*

What is driving monetary policy decisions now? Inflation is continuing to moderate bringing the Fed's mandate on full employment into greater focus.

The post-pandemic economy has been incredibly resilient. A snapshot of the economy today looks pretty good, but how much airbrushing is it taking to make the economy look good and is this airbrushing sustainable?

## FHLB- Post Election

*Drew Simmons,  
FHLBank, Topeka*

Prior to the results of the Presidential Election last November, there was a great deal of uncertainty on how the new administration would impact the Federal Home Loan Bank (FHLB) System. This session will review some of the recent changes that have been made to the FHLB System over the last 4 years under the Biden administration and what future changes might unfold under the new Trump administration. The session will also look back at recent funding and bank performance trends for Oklahoma banks, economic considerations and an outlook on the future for Oklahoma Bankers.

## A Winning Strategy: Using Technology to Help Your Bank Win

*Robert Mendez, BankOnIT USA, Oklahoma City*

Artificial Intelligence, Fintech, Apps, and more are creating an ever-expanding selection of technology banks can choose from for a chance to enhance their success. However, many of these choices also come with risks that are not clearly understood. Hear about some of the wins, and fails, banks have had with technology and how you can increase your banks opportunity for a winning technology strategy.

## Wire and Check Fraud: Recent Cases and Best Practices

*Joel Harmon and Zane Anderson  
Crowe & Dunlevy, Oklahoma City*

Creative criminals are causing an increase in both wire and check fraud. This session will address key recent cases along with best practices to help prevent losses.

## Strategic Planning for Community Banks

*Miles Pringle  
The Bankers Bank, Oklahoma City*

Every organization is only as good as the people that work for it. This presentation will discuss current staffing challenges and offer solutions to address them. We will think strategically about how to address some of the banks' biggest challenges. Topics discussed will include:

- i) succession of leadership and key positions;
- ii) improving/maintaining employee moral;
- iii) how to get the best out of every generation in the workplace;
- iv) measuring success

## Examiner Hot Spots and Regulatory Concerns

*Lori Jackson, Director,  
Forvis Mazars, Oklahoma City*

It has been said that the only constant is change. That is certainly true when it comes to consumer compliance and regulatory concerns. Are the tides changing? What will be the hot topics and regulatory concerns for bank regulators under the new administration? In this session, we will discuss those questions and provide guidance as to where banks should consider focusing their compliance resources.

## New FDIC Third-Party Risk Management Guide: A Deep Dive

*Brendtly Lauck  
Eide Bailly, Des Moines*

As the financial landscape increasingly relies on third-party providers, effective third-party risk management (TPRM) is essential. The FDIC's new Third-Party Risk Management Guide for Community Banks introduces new expectations for financial institutions.

This presentation will offer a comprehensive overview of the FDIC guidance, providing actionable steps to help establish your bank's TPRM program.

## 2025 Community Banking Outlook

*Chet Fenimore  
Fenimore Kay Harrison, Austin*

The landscape in which community banks operate seems to be ever changing. This presentation will provide a recap of the major events that have occurred in the banking market in the previous year and an update on the legal, regulatory, strategic and corporate/risk governance that the bank executives and directors should know in setting the strategic direction of the bank. The regulatory update will include a summary of major Supreme Court cases, CFPB rulemaking, including the implementation of Section 1071, and regulatory enforcement actions.





**2025 SENIOR MANAGEMENT FORUM  
REGISTRATION FORM  
RENAISSANCE ESERALDA RESORT & SPA  
Indian Wells, CA  
April 6-8, 2025**

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

\* To qualify, you must enroll by February 28, 2025.

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

\* Registration deadline is March 14, 2025.

**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 5-8: \$319**

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

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

**\*\* Reservation deadline: Friday, March 17, 2025**

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

**•Note: Rate does not include applicable taxes and \$30 plus tax daily resort fee.**

**<https://book.passkey.com/go/OBA2025>**

**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](mailto:adrian@oba.com).**

**For questions about the conference, please contact Janis Reeser at [janisr@oba.com](mailto:janisr@oba.com) or  
405-424-5252.**

(OVER)

REGISTRATION FORM CONTINUED

PAYMENT

Registration fee for Banker \$ \_\_\_\_\_  
 Registration fee for Guest \$ \_\_\_\_\_ 0 \_\_\_\_\_  
 Golf Fees:  
     Golf \$300 \$ \_\_\_\_\_  
     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 7, 2025. Cancellations submitted after March 7, 2025 are no longer eligible for refunds. However, substitutions can be made.*

Please mail registration forms and payment to:

Oklahoma Bankers Association  
 2025 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**

**FHN Financial  
Oklahoma State Banking Department  
The Bankers Bank**

## **Silver Level**

**Benchmark Operations  
BOKF  
Cornerstone Advisors**

## **Bronze Level**

**FHLB Topeka  
Integris  
NFP  
PRI**

## **Conference Sponsors**

**Hotel Welcome Letters  
Monday Breakfast Monday  
Morning Break Tuesday  
Morning Break**

**American Bankers Association Crowe  
& Dunlevy  
McAfee & Taft  
Fenimore, Kay, Harrison**

## **Golf Sponsors**

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Closest to the Pin**

**Eide Bailly  
Forvis Mazars  
PNC Capital Markets  
United Bankers Life & Casualty Banc  
Card of America Inc.**

## **General Sponsor**

**American Bankers Association Verge  
Network Solutions**

***Sponsors as of January 10, 2025***

***Additional sponsorships are still available. Contact Thi Pham  
at [thi@oba.com](mailto:thi@oba.com) for more information!***