# CBAI ASSOCIATE MEMBER DIRECTORY

A Solutions Network for Community Banks



# CBAI ASSOCIATE MEMBER DIRECTORY Fall 2023

# INDEX OF ADVERTISERS

Thank you for your support!

Barack Ferrazzano Kirschbaum & Nagelberg LLP Federal Home Loan Bank of Chicago

Page 26 Back Cover



One Mission. Community Banks.

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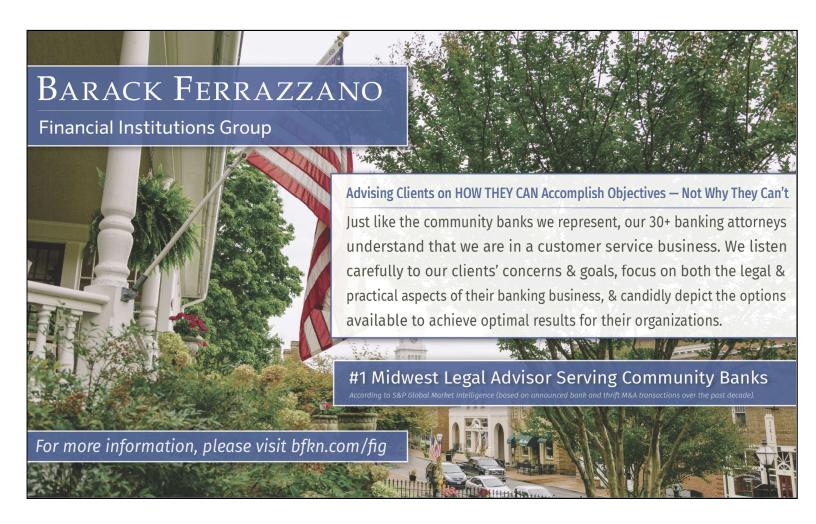
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## CBAI Foundation for Community Banking Levels of Giving

Presidential — \$100,000+ Diamond — \$50,000 to \$99,999 Platinum — \$25,000 to \$49,999 Gold — \$10,000 to \$24,999 Silver — \$5,000 to \$9,999 Bronze — \$2,500 to \$4,999

(Donations are cumulative and may be made over a period of years. Special privileges are offered with each level).

If your bank has not already done so, please consider making a 100% tax-deductible contribution to the Foundation. Pledges may be made on a multi-year basis.

## **GET INVOLVED IN CBAI'S SCHOLARSHIP PROGRAM!**

The CBAI Foundation for Community Banking provides funding for the CBAI Annual Scholarship Program for Illinois high-school seniors and for the three Child of Community Banker Scholarships. Additionally, four, two-year scholarships for bankers to attend the Community Bankers School is now available annually!

With college tuitions rising every year, these statewide scholarships help deserving young adults further their educations and develop as tomorrow's leaders. The Foundation also strives to increase public awareness of community banks and their contributions to society.

### CBAI ANNUAL SCHOLARSHIP PROGRAM

Via an essay-writing contest on a topic about community banking, high-school seniors from all over the state compete. CBAI now offers 11 \$1,000 scholarships, 12 \$500 scholarships, and one \$4,000 scholarship to the statewide winner — EVERY YEAR! There is **no cost to your bank** to participate!

### SCHOLARSHIPS FOR CHILDREN OF COMMUNITY BANKERS

SHAZAM®, Kasasa, and Community BancService (CBSC) Scholarships are given annually in the amount of \$1,000 per year for up to four years. Winners are chosen from banks which have pledged/donated a minimum of \$2,500 to the Foundation. They are the result of generous donations from the SHAZAM®, Kasasa, both preferred service providers of Community BancService Corporation, Inc., and CBSC itself.

### SCHOLARSHIPS TO THE COMMUNITY BANKERS SCHOOL

Four two-year scholarships for bankers to attend the Community Bankers School are now available annually! Winners are chosen from banks which have pledged/donated a minimum of \$2,500 to the Foundation. They are endowed by the Federal Home Loan Bank of Chicago, THE BAKER GROUP, CBAI Career Development Division (CDD), and Howard & Howard Attorneys.



For more information regarding the Foundation, contact the CBAI Department of Communications at 800/736-2224 or cbaicom@cbai.com

# COMMUNITY BANCSERVICE CORPORATION PARTNERS



Founded as a separate corporate entity in 1981 to provide special member services, **Community BancService Corporation, Inc. (CBSC)**, aggregates the clout of CBAI member banks to negotiate lower costs, more favorable terms and improved access to essential bank products and services. Before CBSC rolls out a new program, it is subjected to a thorough review.

### **DUE DILIGENCE**

Community banks are required to gather, analyze, and report an enormous amount of information about their third-party service providers. Recently, bankers told CBSC staff that examiners now expect a due diligence file on every bank vendor — even the snow-removal company! The CBSC staff and leadership invest hundreds of hours annually evaluating new vendor services, checking references, analyzing financial statements, and verifying vendor performance. The board also insists that new programs provide member benefits. Often a benefit is improved contract terms; i.e., the board may negotiate a shorter term or reduce termination requirements. In many agreements, CBSC has strengthened vendor-performance requirements by making them liable for their actions. Those are benefits that bankers don't often see because they are not as visible as a discount or rebate, but they are just as important.

ADLUMIN INC. is the command center for security operations built on patented serverless data processing architecture. With Adlumin, community banks have access to a foundational technology that combines telemetry collection software and integrations, data science and threat research strategies, active directory and account monitoring, log management capabilities, and more. Adlumin is a cost-efficient platform viable solution for any-sized bank – small, medium, or large. CBAI members will receive a 10% discount. David Miller – 763/528-8793 – www.adlumin.com

THE BAKER GROUP is a leader in the development of asset/liability and investment portfolio strategies for community banks. As an independently owned firm, Baker specializes in products and programs designed to address community banks' needs in investment portfolio analysis, securities selection, and interest-rate risk management. Terry McElwee, Ken Judd, Deon Perryman, Frank Coffey, Mo Kelley, or Jason Vlcek – 888/333-7704 – www.gobaker.com

BANKERS HELPING BANKERS – A free, bankers-only network that allows participants access to user groups and data tools designed to help strengthen their banks and adapt to the changing technological landscape. The network enables bankers across the nation to connect based on shared interests such as asset size, core processing vendor, technology offerings, and other topics important to community banking executives. Connect with your colleagues nationwide and join Bankers Helping Bankers today! Mike Kelley – 217/529-2265 – www.bankershelpingbankers.com

CBAI 401(k) MULTIPLE EMPLOYER PLAN – The CBAI MEP enables participating banks to outsource 401(k) plan fiduciary responsibilities and liabilities more effectively, while providing potential cost savings. Nathan White – 800/732-8601 – www.midwesternsecurities.com

CBAI WEBSITE HOSTING AND ENHANCED EMAIL SERVICES – For more than 20 years, CBAI has been hosting websites for member banks utilizing state-of-the-art technology, security, and superior customer support, at the deeply discounted rate of just \$1,295 annually.

CBAI's Enhanced Email Service provides member banks with access to exchange hosting, remote access, full archiving, encryption, calendaring, and Office 365, at discounts of up to 40%. These email solutions have met FINRA and SEC privacy and security requirements, including fully redundant SOC 2 Type II-audited and backed with outstanding support. Jenny Dial  $-\,800/736-2224$ 

CRA PARTNERS helps create safe and secure living environments for the elderly with help from local banks. Partner with CRA and you will receive CRA credit, boost your community relations profile, and develop new business relationships, while ensuring safe, secure environments in nursing homes, HUD communities and veteran's homes. David Lenoir – 901/529-4786 – www.shcpfoun dation.org

CSC provides the most complete and accurate UCC search, filing, retrieval and portfolio-management services nationwide. CBAI members receive discounts up to 45 percent. Russell Lash – 800/858-5294 X63714 – www.cscfinancialonline.com

COLLEGE AVE STUDENT LOANS – College Ave's referral program gives Illinois' community banks the ability to serve the higher education funding needs of their customers and local communities with a trusted partner in the student loan industry while avoiding all loan administration responsibility and credit risk. The online application is easy to complete, and borrowers receive a credit decision in less than three minutes. Mike Duke – 217/529-2265 – www.collegeave.com/partner

CORE10 – Core10's Accrue platform provides community banks with a highly configurable and scalable digital account opening and lending solution that supports consumer and commercial transactions. CBAI members receive a 5% discount on Accrue's standard product and service fees. Tyler Brantley – 706/424-2721 – www.core10.io

COMMUNITY BANCINSURANCE SERVICES, A GALLAGHER COMPANY provides CBAI member banks with the best source for insurance solutions, including bank blanket bond, D&O liability, property and casualty coverage, cyber and group health. CBAI members receive a free review of their bank's current insurance coverage. Patti Tobin – 217/414-4485 – www.ajg.com

DATA BUSINESS EQUIPMENT, INC. – CBAI members receive exclusive discounts on the purchase of Glory Global Solutions' currency counters, coin packagers, automatic coin wrappers, MICR encoders, ATMs, Intelligent Cash Recyclers and Self-Service Coin Solutions. Jeff Radtke – 847/341-0747 – www.dbeinc.com

ECONOCHECK – Relationship Checking Programs and strategies can help your bank earn up to \$60 per year in net profit per DDA, and CBAI members receive preferred pricing on the Secure Checking Package. Nancy Planells – 314/323-2252 – www.econocheck.com

FITECH enables community banks to provide small business clients with merchant card processing at no risk to the bank, while generating a new revenue stream of 30-50% of the net margin. Fitech's focus is in providing community bank business customers with competitive pricing and superior customer service. Rian Clinton – 817/698-2253 – www.fitech.com

# COMMUNITY BANCSERVICE CORPORATION PARTNERS

ICBA BANCARD/TCM BANK – This program provides community banks with access to stable, cutting-edge credit card direct issuing and agent program options to meet your bank's credit card strategy. Heather Sullivan– 202/597-0330 – www.icbabancard.org

IRONCORE, INC. provides innovative technology solutions based on banking industry knowledge and best-practice methodology for cybersecurity, cloud hosting, managed networks, and IT lifecycle management. CBAI members receive a 5% discount. As an additional member benefit, members can request a free annual vulnerability scan. Joe Carty – 608/799-3701 – www.ironcoreinc.com

IZALE FINANCIAL GROUP – BOLI plans are commonly used by banks to fund the ever-rising cost of executive and employee benefits and are powerful tools to help recruit and retain key employees. Bank regulations and tax laws are complex. The experts at IZALE have proven themselves to be among the best in the business at structuring plans that maximize return and avoid unanticipated tax consequences. IZALE will provide CBAI members with a complimentary, no-obligation review of their existing plan. Scott Richardson – 847/902-3401 or Phil Aderton – 630/561-9071 – www.izalefg.com

JMFA can help your bank achieve better results through strategic, data-driven recommendations. With JMFA on your side, community banks can stay ahead of regulatory and examiner expectations with a consumer-focused overdraft strategy that preserves revenue and includes a 100% compliance guarantee. Banks can also efficiently uncover significant savings and secure more value for new, innovative, consumer-driven services. Dan Boyer – 635/275-2901 – www.jmfa.com

KASASA is the innovative leader in branded, community-powered banking products proven to drive profit and growth for community banks. With unprecedented access to training, compliance, research, support resources and customized consulting, Kasasa's flagship suite provides a research-based strategy, leveraging the power of a branded relationship platform. Ron Smalley – 317/796-9906 – www.kasasa.com

KLARIVIS is the only cloud-based, core-agnostic enterprise dash-board and analytics solution built for bankers, by bankers. The KlariVis platform compiles and aggregates high-value, actionable data into an intuitive, interactive dashboard that provides financial institutions of all sizes with timely insights that empower teams, drive profitability, and improve productivity at every level of the organization. Amber Robinson – 603/860-3162 – www.klarivis.com

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PORTX – A financial infrastructure and integration technology company, PortX enables community banks to eliminate dependencies on banking core vendors through its API-based Integration-Platform-as-a-Service (IPaaS) solution. David Wexler – 206/854-0755 – www.portx.io

QUILO is a core-independent digital consumer lending platform that empowers banks to underwrite, approve, instantly fund and service personal loans for their account holders AND provide instant financing for the customers of their small business clients who sell products and services that cost hundreds or thousands of dollars. Don Shafer – 972/793-2996 – www.quiloit.com

REGENCY360 – Regency's Online Company Store automates the acquisition, distribution, warehousing and invoicing of office supplies, corporate-logoed apparel, and promotional items. The gained efficiencies save time. Bulk-purchasing, offsite storage and on-demand fulfillment saves money. The administrative dashboard puts bank management in control of all aspects of the supply chain including product usage by department and branch. John Bybee – 217/653-4028 – www.Regency360.com

SHAZAM® is a national member-owned debit network, processor, and core provider. Founded in 1976, SHAZAM is a leader in payments and financial technology with a simple mission: strengthening community financial institutions. CBAI members receive an annual rebate of \$50 per ATM. Cynthia Glover – 800/537-5427 – www.shazam.net

DocuCommand is SHAZAM's advanced, enterprise-wide document scanning, archiving, retrieval, and management system. CBAI members receive a 5% discount. Wayne Sanderford – 922/342-6700

THE STONE RIVER GROUP (SRG) electric and gas procurement experts are independent of any energy producers, sellers, or transmitters. They do not make or sell power – they make it more affordable for CBAI members. To ensure CBAI members receive the best possible price, SRG solicits qualified proposals from a number of gas and electricity service providers. Additionally, SRG consultants will aggregate members from the same region of the state and use their combined purchasing power to negotiate even lower rates. Don Frontone – 217/737-5811 – www.thestonerivergroup.com

VERICAST – Vericast is a leading provider of customer engagement solutions that help connect businesses and people how, when, and where it matters. Key solutions include Digital Knowledge Management, Voice of the Customer, Contact Center Services, and Instant Card issuance. Member banks that enter into a check-purchasing agreement with Vericast earn marketing dollars on every check order, which are redeemable at up to 75% of the purchase price of additional products and services. Natalie Kolander – 612/327-7078, or Frances Garcia – 210/714-5822 – www.vericast.com

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# CBAI's Career Development Division

The Career Development Division (CDD) is a vital program of CBAI that nurtures and enhances the careers of up-and-comers at your bank.

Its membership of more than 200 individuals enjoys educational experiences, networking opportunities, discounts on CBAI activities, professional publications, social functions and more.

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