

## Branch Manager Group Registration

Yes! I would like to participate in CBAI's Branch Manager Groups

\_\_\_ Group A (Springfield) \_\_\_ Group B (Utica)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Bank: \_\_\_\_\_

Assets: \_\_\_\_\_

Address: \_\_\_\_\_

City/Zip: \_\_\_\_\_

Telephone No: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Please select your payment method.

- Check Enclosed     Check in Mail  
 Pay at Door         Credit Card\*

*\*If you are paying by credit card, please fill out the following information.*


Name as It Reads on Card \_\_\_\_\_


Card Number \_\_\_\_\_

Company Name on Card \_\_\_\_\_

Exp Date \_\_\_\_\_ Security Code \_\_\_\_\_

 Mail it in:  
CBAI Education  
901 Community Dr.  
Springfield, IL 62703

 Fax it in:  
(217) 585-8738

 Call it in:  
(800) 736-2224

 Click it in:  
[www.cbai.com](http://www.cbai.com)

## 2020 Dates

### Group A – Springfield

- January 22, 2020
- April 22, 2020
- July 22, 2020
- October 21, 2020

### Group B – Utica

- January 31, 2020
- May 1, 2020
- July 31, 2020
- October 23, 2020

## How Do the Groups Work?

- CBAI organizes the groups based on bank size and market to ensure that members have as much in common as possible without being competitors. Members do not have to have the title of Branch Manager to participate.
- The groups remain small (no more than 12 participants in each group).
- Other consultants from a variety of firms may be invited to address the group. This expertise would cost thousands of dollars if you had to pay for it on a “real-time” basis.
- Four to six issues are usually discussed at each session and are member-selected.

## How Do I Sign Up?

Return the registration form on the back of this brochure. The cost to participate in the Branch Manager Groups is \$999 annually. Checks should be made payable to CBAI.

If you have any questions regarding the Branch Manager Groups, please call Melinda McClelland, vice president of Education and Special Events, at 800/736-2224 or via e-mail at [melindam@cbai.com](mailto:melindam@cbai.com).



## Sample Topics Discussed

The agenda each quarter is member selected. Therefore, any ideas or discussions are decided by those participating in the groups. Meetings begin by each member discussing key projects or tasks they are working on along with any exams or major items that have taken place at their banks since the last quarterly meeting. Other topics include:

- Networking discussions on key products, services and vendors
- Key regulatory issues that affect banks and ideas to best tackle the issue
- Hiring and firing of employees
- Employee personnel issues: i.e., work attire, sample policies regarding cell-phone usage/e-mail/social media at work, etc.
- Sharing of sample forms
- Team and leadership motivation
- Sales techniques for employees
- Marketing ideas for the branch
- Emerging technologies in banking
- Discussions of bank examinations
- Sales incentive ideas/themes
- Bank promotion ideas
- Team meeting ideas
- Staff games/pep rally ideas
- What's working in branches, what isn't
- How to increase branch traffic



## Meet Your Group Facilitators

The Community Bankers Association of Illinois has selected Heather Powell, manager at BKD, LLP, Decatur, to facilitate the Branch Manager Group held in Springfield and Jennifer Lafferty, consultant, with Wipfli LLP, to facilitate the Utica Group.

### Springfield Location

As a member of BKD National Financial Services Group, Heather Powell specializes in providing a full range of assurance services to banks. She manages engagement work performed by supervising and staff accountants. Powell has more than 17 years of public accounting experience. She is a member of the American Institute of CPAs and Illinois CPA Society. Heather also serves on the BKD Foundation board, which directs contributed funds to charitable organizations and organizes an annual officewide charitable project.

### Utica Location

Jennifer Lafferty works with large and small financial institution clients to assess the effectiveness of their compliance policies, procedures, and practices. She is a member of the regulatory compliance team and has a strong background in Bank Secrecy Act (BSA) and deposit compliance as well as customer service, sales, and marketing. With nearly 20 years of experience in banking, Lafferty is well-versed in the industry's practices and procedures.