

2025 Op/Tech Locations

Group A: Springfield – Bert Purdy, Forvis

Group B: Naperville – Ken Kulawiak, Wipfli

Group C: Springfield – Greg Schaller,
Forvis Mazars

Group D: Mt. Vernon – Leslie Wilson,
Forvis Mazars

Group E: Utica – Ken Kulawiak, Wipfli

Please return the registration form with your check for \$1,099 for the four quarterly meetings. Any questions, please contact Melinda McClelland, VP of Education & Special Events at 800/736-2224 or via e-mail at melindam@cba.com

Annual Registration Fee:
\$1,099



800.736.2224



217.585.8738



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CBAI
901 COMMUNITY DR
SPRINGFIELD, IL 62703



2025 Operations/Technology Groups Registration

I would like to participate in the following group:

 Group A Group D Group B Group E Group C

Name: _____

Title: _____

Bank: _____

Assets: _____

Address: _____

City/Zip: _____

Phone #: _____

Email: _____

(Email address required for registration.)

Please select your payment method:

 Check Enclosed Check in the Mail Credit Card*

Name on Card: _____

Card #: _____

Exp. Date: _____

3-Digit Security Code: _____

CBAI Presents 2025 OPERATIONS & TECHNOLOGY GROUPS



How Do the Groups Work?

- CBAI organizes the Groups based on bank size and market to ensure that participants have as much in common as possible without being competitors.
- The groups remain small: 12-15 members.
- Other consultants from a variety of firms may be invited to address the group. This expertise would cost thousands of dollars if you paid for it on a “real-time” basis.
- Groups meet quarterly on a date and at a location determined by the Group.
- Four to six issues are usually discussed at each session. Participants are contacted for agenda items approximately two weeks prior to each meeting.
- A manual based on Group topics/agenda items is compiled.

Benefits of the Groups

- Improve the bank’s operation practices
- Increase your understanding of technological issues you face daily
- Form lasting relationships with non-competing operations & technology personnel
- Solve your most pressing problems
- Obtain access to highly respected financial technology experts
- Discuss products and services
- Trade policies and procedures
- Talk about cybersecurity issues concerning community banks and how to solve them
- Discuss recent scams affecting customers and communities and how to protect community banks

Meet Your Facilitators

Bert Purdy, partner with Forvis Mazars, brings over 20 years’ experience to the clients he serves. He provides a wide range of accounting, auditing, and consulting services.

Ken Kulawiak is a senior manager in Wipfli’s cybersecurity and technology management practice. He specializes in helping organizations mature their information security posture by reducing risks to a strategic level.

As a managing director of Forvis Mazars, Greg Schaller brings nearly 20 years of audit experience to the clients he serves.

Leslie Wilson is partner with over 20 years of experience with Forvis Mazars. She works with financial institutions to assist them with a full range of assurance and consulting services.

CBAI’s Op/Tech Groups provide an opportunity for community bank personnel to discuss important issues with non-competing community bankers. The groups are designed to provide a rewarding experience where you can grow professionally and professionally.

Here’s What Others Are Saying:

“The opportunity to interact with peers with common interests and concerns makes this forum an event I always look forward to attending.”

Gaileh Tice, Vice President
West Central Bank, Ashland

“The group members stay in contact with one another by e-mail between the meetings. Having a group to discuss issues with or new products/services they may have already implemented is great.”

Nancy Mueller, Vice President/Cashier
Scott State Bank, Bethany

“I find great value from hearing what each banker is working on, struggling with, or considering putting in place at their bank.”

Christy Murphy, Vice President
Community Bank, Trenton

Two Anonymous Remarks:

“I enjoy learning new ideas that benefit my bank and make my job more efficient. I also like getting feedback on what I am working on and if there are any tips that can help.”

“Hearing what other banks are experiencing and what products/services they use are very helpful. I always come away from the meetings with something I can use if not right away, in the future.”