

# Senior Lender Forums Registration

☐ Yes! I would like to participate in the first meeting of CBAI’s Senior Lender Forums.

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

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

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

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

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

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

Telephone #: \_\_\_\_\_

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

Please select your payment method:

☐ Check Enclosed

☐ Check in Mail

☐ Credit Card\*

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

Name on card: \_\_\_\_\_

Card #: \_\_\_\_\_

Exp. Date: \_\_\_\_\_ 3-Digit Security Code: \_\_\_\_\_

Visa, MasterCard & Discover accepted. \_\_\_\_\_

# POSSIBLE FORUM TOPICS

## Profitability Issues

- The economy/marketplace
- Pricing discipline
- Loan fees/waivers
- Margin maintenance
- Customer segmentation

## Regulatory Issues

- Current events
- Reg Z
- Examiners’ hot buttons

## Lending/Risk Issues

- Making underwriting more effective
- Mistakes lenders make
- Loan grading
- Handling problem credits

## Personal Growth

- Time management
- Leadership and vision
- Communication strategies

## Alternative Products/Emerging Issues

- Mortgage-market products
- Environmental insurance

## Sales Issues

- Negotiation skills
- Motivation and incentives

## People Issues

- Coaching for performance
- Personal improvement plans

## Technology Trends

- New products

# CBAI’s 2025 SENIOR LENDER FORUMS



# SENIOR LENDER FORUMS

CBAI is pleased to offer the Senior Lender Forums. The Forums provide an opportunity for community bank lenders to discuss important issues with non-competing community bankers. The Senior Lender Forums are designed to be a rewarding experience where you can grow professionally, as well as personally.

## HOW DO THE FORUMS WORK?

- CBAI organizes the Forums to ensure that senior lenders have as much in common as possible without being competitors.
- The groups remain small (no more than 14 participants). Because each participant must trust other Forum members, no substitutes are permitted unless by unanimous consent of the remaining members.
- 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.
- Forums meet quarterly on a date and location determined by the Forum members.
- 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 Forum topics is compiled.

## BENEFITS OF THE FORUMS

- Improve the profitability of your loan portfolio
- Reduce the risk in your loan portfolio
- Increase your understanding of regulatory issues
- Form lasting relationships with non-competing senior lenders
- Solve your most pressing problems
- Obtain access to highly respected banking experts
- Grow professionally as well as personally

## 2025 Dates & Locations

**Group I - Jan 29, May 7, Aug 13, Nov 19**

**Group II - Jan 28, May 6, Aug 12, Nov 18**

**Group III - Jan 30, May 8, Aug 14, Nov 20**

**Group IV - Jan 31, May 9, Aug 15, Nov 21**

**Group V - Jan 27, May 5, Aug 11, Nov 17**

Forums I, II, III and IV are held at CBAI Headquarters,  
901 Community Drive, Springfield, IL.

Forum V is held at the Chicago Marriott Naperville,  
1801 North Naper Boulevard, Naperville, IL.

## FOR MORE INFORMATION

Contact Tracy McQuinn, SVP of Education & Special Events at CBAI Headquarters.



tracym@cba.com



217.529.2265 or 800.736.2224



217.585.8738



Community Bankers Association of Illinois  
901 Community Drive  
Springfield, IL 62703

### SENIOR LENDER PRICING – \$1,300 PER YEAR

You may attend the first meeting at the pro-rated fee of \$325. Then, if you decide to join the Forum on a permanent basis, you pay for the remaining three quarters, or \$975.

## MEET YOUR FACILITATOR

**Richard Hamm** has been training bankers for over 30 years, designing and delivering courses specializing in commercial lending and credit, including portfolio and risk management, commercial real estate (CRE) and appraisals, plus selling and negotiating skills, and director training. His clients include national associations such as The Risk Management Association (RMA); regional banking schools such as the Barret School of Banking – Memphis, the Graduate School of Banking – Wisconsin, the Southwestern Graduate School of Banking – Dallas, the Graduate School of Banking at Colorado, and the Western States School of Banking, New Mexico; state-banking and community-banking associations in a dozen states; and individual banks.

He is based in Huntsville, AL, and has owned/operated Advantage Consulting & Training for 14 years, after a 22-year banking career including senior positions in lending and credit, plus president of a community bank. He has BS and MBA degrees from the University of Alabama, Tuscaloosa.

## What Others Have Said:

"I value the information and ideas shared within our group. It has been a great resource for me throughout the year. Richard Hamm does a good job of keeping the information shared current and interesting."

Deb Schultz, AVP, ABM, Lender  
North Central Bank, Hennepin

"The interaction with peers is invaluable. I look forward to sharing ideas, challenges and strategies with the group every quarter. Richard Hamm is a great facilitator!"

David Bitting, First Vice President  
The First National Bank in Tremont

"The Senior Lender Forum is my best tool for continuing education & networking. Highly recommend!"

Kyle Brueggemann, Vice President  
Community Bank of Trenton