## 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: ______________________________

Fax 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**

## 2019 Dates

## Group A –– Springfield

- January 23, 2019
- April 17, 2019
- July 24, 2019
- October 23, 2019

## Group B –– Utica

- February 8, 2019
- April 26, 2019
- August 2, 2019
- October 25, 2019

## 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.

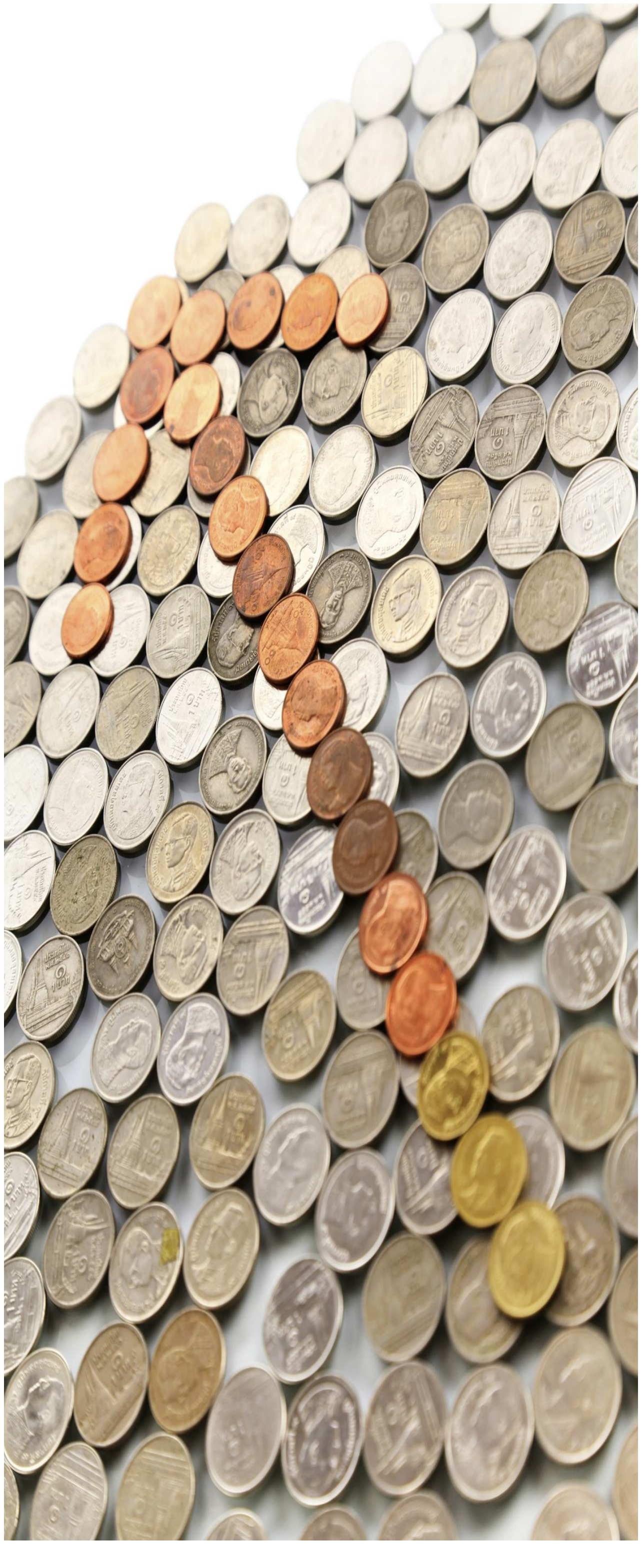
# CBAI's Branch Manager Groups

## Invest In Your Bottom Line Today!

## Sample Topics Discussed

The agenda is 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 or 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 **Robin Guthridge,** senior manager, CAMS, CRCM, compliance, 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

**Robin Guthridge,** CAMS, has a strong background in Bank Secrecy Act (BSA) compliance, leadership, and sales management. In addition to performing BSA and deposit compliance examinations for various institutions, she has developed, implemented, and presented annual BSA workshops with over 100 Wipfli LLP clients and prospects in attendance. Guthridge uses her firsthand experience in the financial service industry to provide meaningful insight and helpful recommendations in the areas of BSA and deposit compliance. Her goal is to exceed client expectations with every contact.