



SEPTEMBER 17 - 19, 2026
INDIANAPOLIS, IN

CBAI is “traveling” to Indianapolis, Indiana, for its 52nd Annual Convention & Exposition. Basketball runs through the veins of the Midwest like corn through its fields - deep-rooted, resilient and fiercely loyal. Born in Massachusetts but baptized in the barns, gyms and driveways of Illinois, Indiana and beyond, the game became more than just a sport in the Heartland; it became a way of life.

One of the most iconic moments ever in basketball history came in 1954, when tiny Milan High School in Indiana defied the odds to win the state championship - a Cinderella story that inspired the classic movie “Hoosiers.” The story is a classic “David vs. Goliath” narrative, showing how a small-town team can achieve great things and overcome larger, more established opponents.

Community banking, like basketball, is about strategy, execution and staying ahead of the competition. Just as a basketball team thrives with a strong coach and talented players, a successful bank needs leadership, sharp decision making and the ability to adapt to a fast-paced game. Basketball history is full of hometown pride, underdog victories and game-changing moments - the same qualities that define community bankers.

No matter what position you play in community banking, the lessons of the hardwood apply: work on the fundamentals; trust your team; and always take the shot when opportunity arises.

Register your team for CBAI’s 52nd Annual Convention & Exposition in Indianapolis, Indiana. From tip-off to the final buzzer, you don’t want to miss one shining moment!

“Nothing has ever been accomplished in any walk of life without enthusiasm, without motivation, and without perseverance.”

- Jim “Jimmy V” Valvano
Player, Coach & Broadcaster

TEAM SCHEDULE

THURSDAY, SEPTEMBER 17, 2026

10 a.m. - 3 p.m.

52nd Annual Golf Tournament

Southern Dunes Golf Club, Indianapolis

***Bus leaves at 8:30 a.m. from hotel. Registration at 9 a.m.**

10 a.m. - 3 p.m.

Thursday Optional Activity

Daniel's Vineyard Wine Tasting Experience

7 - 10 p.m.

Welcoming Reception & Dinner and

Community BancPac Silent and Live Auctions

FRIDAY - SEPTEMBER 18, 2026

8:30 - 10 a.m.

Opening Breakfast featuring Alan Stein, Jr.

10:15 - 11:30 a.m.

CBAI's Fintech Innovations Showcase

powered by the ICBA ThinkTECH Accelerator

10:30 a.m. - 2 p.m.

Partners' Program

From Soil to Spoon - Farm & Creamery Tour

11:45 a.m. - 1:15 p.m.

Business Meeting Luncheon

1:30 - 2:45 p.m.

Opening of the Exhibit Hall with Desserts

3 - 4:15 p.m.

Concurrent Education Sessions

4:15 - 6 p.m.

Hospitality in the Exhibit Hall

6 p.m.

Night On Your Own

SATURDAY, SEPTEMBER 19, 2026

8:30 - 10 a.m.

Continental Breakfast in the Exhibit Hall

10:15 a.m. - 12:30 p.m.

Partners' Program

Corsage & Boutonniere Workshop with

Legislative & Recognition Luncheon

10:15 - 11:15 a.m.

Concurrent Education Sessions

11:30 a.m. - 12:30 p.m.

Concurrent Education Sessions

12:45 - 2 p.m.

Legislative & Recognition Luncheon followed by

CBAI's Foundation Big Shot Showdown Finals

5 - 6 p.m.

The Chairman's Reception

6 - 10 p.m.

Dinner, Show & Homecoming Dance featuring

The Remedies

PLEASE NOTE
THAT
INDIANAPOLIS
IS ON EASTERN
DAYLIGHT TIME.

PRE-GAME WARM-UPS



Southern Dunes Golf Club

THURSDAY GOLF OUTING

The golf outing at CBAI's 52nd Annual Convention & Exposition will be held at Southern Dunes Golf Club, Indianapolis. Designed by Professional Golf legend Gary Player in 2003, Southern Dunes Golf Club features a par 70, 6,516 yard layout with bent grass fairways, strategic bunkering and water hazards. Enjoy this stunning but challenging championship course as you connect with your fellow community bankers.



Daniel's Vineyard

THURSDAY OPTIONAL ACTIVITY

Enjoy a private, guided wine tasting experience at Daniel's Vineyard, one of Indianapolis's most beloved and established wineries, known for its award-winning wines. Daniel's offers a relaxed yet refined atmosphere perfect for unwinding together. Guests are led through a curated tasting in a dedicated private space, learning about the vineyard's winemaking process and signature varietals as they enjoy a delicious lunch. Afterwards, you are free to explore the grounds at your leisure - strolling the vineyard, relaxing outdoors and enjoying additional wine on your own.

"Champions do not become champions when they win an event, but in the hours, weeks, months and years they spend preparing for it."

**- Michael Jordan, The GOAT
Six-time NBA Champion**

HOME OPENER

Get ready to tip off CBAI's 52nd Annual Convention & Exposition with a Welcoming Reception that brings all the energy of a home opener! Enjoy delicious food, sip a few beverages, and reconnect with teammates as you browse the silent and live auction tables supporting CBAI's Community BancPac.

You can also show your support and celebrate the 30th Anniversary of CBAI Foundation for Community Banking scholarship program by purchasing a "Mystery Box" to win a prize! Mystery boxes will be available one for \$30 or two for \$50!

Music for the evening is provided by everyone's favorite - The Backroads Band featuring CBAI's own Jeff Rabenort!

So lace up your Jordan's, don your favorite basketball jersey, and join us as we launch CBAI's 52nd Annual Convention & Expo! Everyone's bringing their A-game, team spirit and nothing but full-court energy! No benchwarmers allowed!

STARTING POINT GUARD

Alan Stein, Jr. teaches proven strategies to improve organizational performance, create effective leadership, increase team cohesion and collaboration, and develop winning mindsets, rituals and routines. He shares real-world lessons, illustrated by powerful stories, so that every audience can immediately put new ideas into action.

An acclaimed basketball performance coach, Stein, Jr. spent 15 years working with the highest-performing athletes on the planet (including NBA superstars Kevin Durant, Stephen Curry and Kobe Bryant). He transfers that knowledge to reveal how leaders and teams can utilize the same approaches in business that elite athletes use to perform at a world-class level.

Stein Jr.'s presentation, titled "Next Play: How to Focus on What Matters Most and Improve Performance, Productivity & Fulfillment," is designed to show how reaching the top of your game doesn't require more. It requires less but better. The Next Play Mindset is the ultimate guide for individuals and organizations who want to close the gap between where they are and where they want to be. It isn't just a performance strategy—it's a life strategy—one that helps you manage transitions, bounce back from adversity, stay centered, adapt quickly, reduce stress and let go of resentment.



"Most people have the will to win, few have the will to prepare to win."
- Bobby Knight, Former Indiana Hoosiers Coach

THE EXHIBITION

Visit our Exhibit Hall featuring the latest products and services for community banks. This enables you to:

- keep abreast of new information, products and services;
- improve purchase management and business development;
- compare prices and products more effectively; and
- save time by seeing all vendors in one location.

Additional attractions in the Exhibit Hall include:

- a walk-around program with three cash prizes for bankers who visit the majority of exhibit booths;
- delicious desserts during the Friday Grand Opening;
- cocktail reception on Friday afternoon; and
- a drawing for \$1,000 cash on Saturday morning.

(You must be present to win.)



Be sure to visit the ICBA ThinkTECH Accelerator Hub in the Exhibit Hall to learn about cutting edge, innovative solutions hand-picked for community banks. Presented by the ICBA, visit this unique space to meet ICBA ThinkTECH Accelerator fintech companies and learn more about how these providers can help your community bank offer enhanced products and services to address the ever-evolving needs of community banks and their customers.

EDUCATION SESSIONS - FRIDAY, SEPTEMBER 18

10:15 - 11:30 a.m.

“CBAI Fintech Showcase powered by the ICBA ThinkTECH Accelerator”

Jacob Bennett, CEO & Co-Founder

Crux Analytics

Dan Bolger, CEO & Founder

Flatirons AI

Kian Sarreshteh, CEO and Sarah Lambert, Marketing

InvestiFi

Cale Johnston, CEO & Founder and Lindsey Johnston, Marketing Onsetto

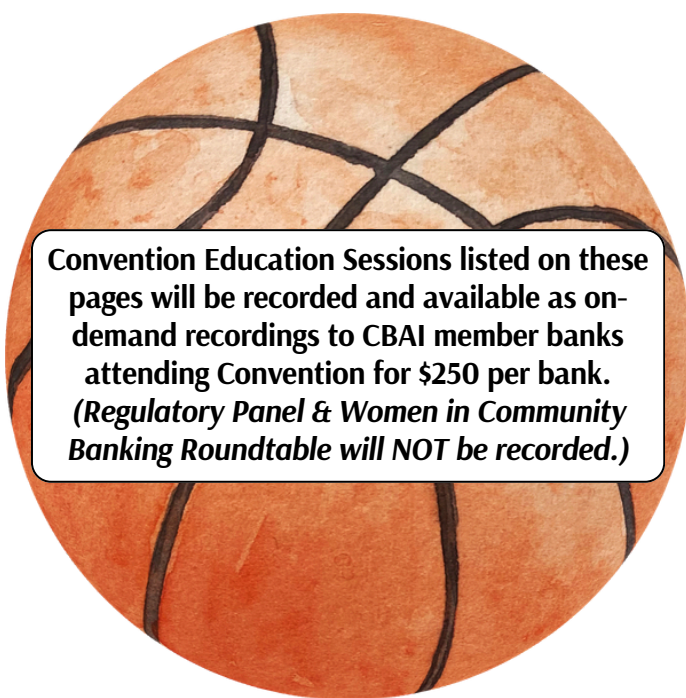
Jay Long, Co-Founder and Alex McLeod, Co-Founder

Parlay

Riya Jagetia, CEO & Co-Founder

Socratix AI

CBAI and ICBA are excited to bring back the CBAI Fintech Showcase, powered by the ICBA ThinkTECH Accelerator! Experience live presentations from ThinkTECH Accelerator alumni, showcasing new technologies and opportunities for your bank to implement innovative new solutions. This session is designed to allow bankers to engage with early stage fintech companies that focus on developing products and solutions specifically for community banks and/or their customers.



Convention Education Sessions listed on these pages will be recorded and available as on-demand recordings to CBAI member banks attending Convention for \$250 per bank. (Regulatory Panel & Women in Community Banking Roundtable will NOT be recorded.)

3 - 4:15 p.m.

“Passing the Torch: Knowledge, Wisdom and Choosing the Right Successor”

Larry Williams, Executive/Consultant/Coach

ExecutiveSense Consulting, Clancy, MT

When experienced leaders retire or move on, banks risk losing far more than job knowledge. They risk losing judgment, relationships and the unspoken wisdom that only comes from years of leading through pressure, ambiguity and change. Choosing the right successor is critical, but that choice only succeeds when paired with a deliberate plan to transfer experience, insight and wisdom over time. This session helps bank leaders move beyond “check-the-box” succession planning and build an intentional system for transferring both knowledge and wisdom to the next generation.

“Digital Assets: How Banks Start the Journey”

Moderator: Brandon Oliver, Principal, Head of Bank Relations BankTech Ventures

Justin Seidl, CTO, Coinbase

Wade Peery, Digital Asset Consultant for Banks

Kian Sarreshteh, Founder & CEO, Investifi

Move beyond “what is a stablecoin” to actionable guidance on how community banks start their digital asset journey. This panel discussion covers regulation, infrastructure, business models and what’s ahead for digital assets.

“Interest Rate Risk & Investment Strategies”

Dillon Wiedemann, SVP

The Baker Group, Oklahoma City, OK

2026 has brought us a new Fed chair, rising geopolitical uncertainty, and a shifting competitive landscape that has created an environment that demands attention from community banks. As we move through the current rate cycle, the pressing question for every ALCO is what comes next. This session discusses the current economic environment, community banking trends, interest rate risk, and investment portfolio strategies to help community bankers prepare their balance sheets for the opportunities and risks that lie ahead.

“Employee Benefit Market Trends and Enterprise Risk Assessment”

Michael Boehm, Vice President

Julie Kappen, Employee Benefits Consultant

Brown & Brown, Daytona Beach, FL

In the community bank world, protecting your assets and people has never been more challenging. Malicious actors are constantly trying to access the bank’s assets using new and old tactics. How do community banks stay ahead of these bad actors? Having a strong P&C program protects you and helps management sleep peacefully at night. Brown & Brown has created the Enterprise Risk Assessment tool to evaluate your current program and show how well the bank, its officers and directors are protected. The ERA helps to explain the reasons behind certain policies. This session also explores the key forces driving employee benefit costs in 2025-2026 and offers actionable strategies employers can use to manage and reduce healthcare spending. The presentation helps community bank leaders better understand the evolving benefits landscape and how to make smarter, more cost-effective choices.

DIRECTORS' TRACK

EDUCATION SESSIONS - SATURDAY, SEPTEMBER 19

10:15 - 11:15 a.m.

"From Busy Work to Better Banking: How AI Helps You Become More Human"

Eric Cook, CEO & Chief Digital Strategist
WSI, Prudenville, MI

Artificial intelligence can still feel overwhelming, but at its best it was never about replacing people, it's about helping bankers become more human. Whether you're at a small institution or a large one, the pressure is the same: do more with less, sharpen the customer experience and stay competitive. AI can help with all of that, but only if you understand what "human" actually means in your job, and protect it on purpose. This session starts by naming what AI can't replicate: the presence to really listen, the empathy to sit with a hard financial conversation, the judgment that comes from experience, the trust that gets built over years, and the creativity to find a better way when the standard answer is no. From there, we get practical. You'll see specific ways AI can hand you back real-time and mental energy, sharper meeting prep, less decision fatigue, and personalization at scale, so that time goes toward the relationships and judgment calls that actually matter.

"US-China Relations and What It Means for American Agriculture"

Dr. Wendong Zhang, Associate Professor in the Dyson School of Applied Economics & Management
Cornell University, Ithaca, NY

China remains the largest foreign market for US agricultural exports, yet escalating trade tensions, tariffs and shifting geopolitical dynamics are reshaping that relationship. This session examines the current state of US-China relations, China's evolving food and agricultural demand, and what community bankers need to know about the implications for farm income, land values and agricultural lending in the Midwest and beyond.

"Women in Community Banking Roundtable"

Moderator: Sheila Burcham, CBAI Past Chairwoman & Director
Legence Bank, Eldorado

Back by popular demand, this session, led by CBAI's Past Chairwoman, Sheila Burcham, is an open forum for women in community banking to discuss issues in banking, leadership and life-work balance. This free-flowing session provides an opportunity for seasoned and new professionals to exchange ideas and learn from each other's experiences.

(This breakout session will not be recorded.)

"An Executive Briefing—A Corporate & Regulatory Update"

Robert M. Fleetwood, Partner & Co-Chair
Financial Institutions Group
Barack Ferrazzano, Chicago, IL

This popular session reviews the most pertinent legal and regulatory developments facing community banks today, delivering practical advice based on industry knowledge and actual client stories from a large and diverse banking practice. Topics discussed will include capital markets developments, current business strategies, and a review of recent regulatory and other industry topics of interest to bank executives.

DIRECTORS' TRACK

11:30 a.m. - 12:30 p.m.

"Regulatory Hot Stuff"

Moderator: David Schroeder, SVP, Federal Governmental Relations, CBAI

Panelists:

Shelli Coffey, FDIC

Jennifer Barney, Federal Reserve Bank of Chicago

Ryan Horsley, Federal Reserve Bank of St. Louis

Susana Soriano, IDFPF

TBD, OCC, Chicago

Are you ready for your next exam? Top regulators discuss the most-up-to-date issues in community bank supervision, including capital, liquidity, asset quality, corporate governance and more.

(This breakout session will not be recorded.)

"AI Driven Fraud and AML Detection"

Ramon Tramontini, President of International Operations
OGI (Objective Group Inc.) Miami, FL

Fraud moves faster, AML expectations weigh heavier than ever, and rules-based systems alone cannot keep pace. This session shows how community banks are using AI to surface suspicious patterns earlier, cut the false positives that drain compliance teams, and strengthen BSA/AML programs without adding headcount they do not have. Tramontini walks through where AI delivers real protection today, what data it needs to work well, and how to deploy it in a way that satisfies both risk officers and examiners.

"Difficult Conversations in the Workplace"

Kathleen Gardiner, Manager, Talent & Engagement
SHAZAM, Johnston, IA

Conflict is inevitable in work and in life. Managers must address performance issues and colleagues with competing priorities must work together. These situations call for having tough conversations. Learn how to conduct tough conversations, build communication skills and enhance relationships that result in better business performance. Identify underlying differences in work styles, goals and power dynamics to change your approach to conflict. As a bonus, you'll receive practical tools to use in your next difficult conversation to help you choose words that won't alienate the other person.

"Preserving Independence and Managing Shareholder Succession in Community Banks"

John Antolik, CEO & Co-Founder
My Private Shares, Ft. Lauderdale, FL
Panelists TBD

Community banks are increasingly facing difficult questions around shareholder succession, generational ownership transitions, and liquidity expectations — all while trying to preserve independence and maintain control of the institution's long-term direction. This session provides community bank leaders with practical strategies for addressing shareholder succession and liquidity challenges before they become disruptive. The discussion focuses on governance planning, shareholder agreements, ownership transition tools, communication practices, and operational processes that help reduce risk and protect the bank's independence. The panel is expected to include experienced advisors who work with community banks on legal, governance, shareholder, and ownership transition matters, and may also include a financial institution perspective.

DIRECTORS' TRACK

COACHING STAFF

The keynote for our Friday business meeting will be **ICBA President and CEO Rebeca Romero Rainey** who will discuss top regulatory, political and competitive issues confronting community banking. **Association Chairman Dan Graham, Flora Bank & Trust**, addresses the delegation on key events during his term; **Incoming Chairman Chad Martin, Goodfield State Bank**, presents his views on the community banking profession looking forward.

CBAI Treasurer Mary Jo Homan, First National Bank in Pinckneyville, reviews the Association's financial position and **Career Development Division Chairman Michael Gill, Flora Bank & Trust**, discusses community banking and the CDD. The delegation also elects CBAI officers for the annual period commencing October 1, 2026. Awards for Outstanding CBAI Member, Service Provider of the Year and Outgoing Chairman are announced at the luncheon, as well.



TIMEOUT!



On Friday night, you are free to take advantage of the many possibilities that Indianapolis has to offer. If you need a little guidance, feel free to contact the hotel front desk for visitor information or go to www.visitindy.com.

"Promise to be just as enthusiastic about the success of others as you are about your own."

- John Wooden, Former UCLA Bruins Coach

MOST VALUABLE PLAYER'S



FRIDAY'S PARTNERS' PROGRAM: From Soil to Spoon - Farm & Creamery Tour

This guided, fully outdoor farm tour offers an authentic look at life on a working, sustainably run farm. Guests are walked through the journey of Traders Point Creamery's products, from soil to spoon, while exploring the scenic property. Visit the Chef's Garden, bee hives, milking parlor and get a behind-the-scenes peek through the production window, along with opportunities to see cows, calves & chickens along the way. The tour ends with lunch and a scoop of Traders Point Creamery's signature handmade ice cream making for a relaxed, educational and distinctly Indy experience.



SATURDAY'S PARTNERS' PROGRAM: Corsage & Boutonniere Workshop

Gather onsite at the hotel for a nostalgic, creative DIY corsage and boutonniere bar, to craft handmade floral accessories to perfectly complement the evening's theme! The workshop kicks off with a brief introduction to the tools and process, QR codes at each station offer step-by-step instructions, inspiration photos, and additional tips, as well as hands-on instruction. All supplies including fresh flowers, greenery and pre-assembled bases are provided. After the workshop, attendees are free to join the Legislative & Recognition Luncheon. Immediately following the luncheon, watch the Final Four face off in the Big Shot Showdown for CBAI Foundation for Community Banking!

ALL-STAR GAME

CBAI would like to take the opportunity during the Legislative & Recognition Luncheon on Saturday to recognize and thank all the outstanding community banks in our membership. Your unwavering support has been the key to the association's success. Jerry Peck, CBAI's senior vice president of governmental relations, also gives a legislative update.

CBAI's spotlight focuses on member bankers and others for outstanding efforts in these categories:

- Association Service;
- Patrons of Community Banking;
- Participation in Education Programs;
- Membership Recruitment;
- Foundation for Community Banking scholarship winners will be announced; and
- The Excellence in Innovation Forvis Mazars Award, sponsored by CBAI.

After the luncheon, stick around for the "Big Shot Showdown" Final Four battle and find out who takes the championship crown as CBAI Foundation Big Shot!



THE BIG DANCE



The lights dim. The band plays. Suddenly, we're all seventeen again - but with better clothes and no curfew. CBAT's homecoming dance is a throwback to the past with a polished, grown-up shine that celebrates community banking and the future ahead. It's where old friends laugh a little louder, new connections form a little faster, and nobody's judging your dance moves! No corsages required. No crowns on the line. Just good music, great company and that unmistakable homecoming feeling - the one that says you belong here.

Dinner begins with a Greek Goddess salad (fresh greens, grilled asparagus, baby corn, sweet peppers, fresh sweet peas, micro herbs and creamy goddess dressing) followed by the main course featuring pepper crusted beef with rich demi-glace, citrus crusted salmon with Grand Marnier cream, potato cake and seasonal vegetables. For dessert, enjoy white and dark chocolate mousse topped with shaved chocolate and berries.

After dinner, The Remedies take the stage. Known as one of the Southeast's most in-demand cover bands featuring a diverse and deep song list and even deeper dance grooves! Their skill and authenticity are only matched by their collective energy that electrifies your party! Covering your favorite hits from artists like Bruno Mars, Taylor Swift, Journey, Michael Jackson, Queen, Stevie Wonder, Bon Jovi, ACDC and more, The Remedies are your party prescription for non-stop, dance-induced excitement!



**GRAND PRIZE TRIP DRAWING WILL BE HELD AT
THE SATURDAY NIGHT DINNER DANCE.
YOU MUST BE PRESENT TO WIN!!!**

“TOURNAMENT INFORMATION”

JW MARRIOTT INDIANAPOLIS

10 S West Street

Indianapolis, IN 46204

Telephone #: 866.704.6162 or 317.444.6809

Passkey Link:

<https://book.passkey.com/go/CBAIAnnual2026>

Single & Double Room Rates: \$235+ tax/fees



LODGING INFORMATION

A block of rooms and suites has been reserved for CBAI convention participants at the JW Marriott Indianapolis. **To assure accommodation availability, reservations should be made at the hotel by August 19, 2026.** Room reservations received after this date are confirmed on a “space-and-rate available basis.”

When you call for hotel reservations, be sure to identify yourself as a CBAI convention attendee.

If you need to cancel your room reservation for any reason, first please contact Melinda McClelland at 217.529.2265 or melindam@cbai.com, who will cancel your reservation to ensure all rooms remain in the CBAI block.

AMENITIES

A state of the art fitness center, full-service business center and complimentary wireless in the lobby and public areas are just a few of the amenities at the JW Marriott.

For your dining pleasure, the hotel features High Velocity, the on-site premium sports bar, which is the perfect spot to relax in a laid back atmosphere and enjoy a cocktail. OP Italian offers a curated collection of authentic cuisine, Neapolitan-style pizza and premium wines. The on-site Starbucks®, located on the second floor of the hotel, is the best way to kick-start your morning with an energizing espresso or freshly brewed cup of coffee.

WHAT TO WEAR

Business casual dress is recommended for comfort and fun during the meetings, partners’ programs and educational programs. For the Thursday night Welcoming Reception, dress casual and show off the basketball team you brag about, curse at, but love anyway! For the Saturday Night Dinner Dance, join us as we recreate the excitement of Homecoming. Attire should reflect your personal take on Homecoming style — classic, retro, elegant or fun!

CONVENTION APP

Get Convention details at your fingertips with CBAI’s interactive app! Features include your personal profile, agenda, activity feed, exhibitor contact information, surveys, speaker materials, and hotel maps, as well as the ability to “follow” people, post comments and more!

FOR MORE INFORMATION

Tracy McQuinn, SVP, Education & Special Events - tracym@cbai.com

Melinda McClelland, SVP, Career Development & Training - melindam@cbai.com

Jennifer Nika, VP, Education & Special Events - jennifern@cbai.com

Tina Wilder, AA, Education & Special Events- tinaw@cbai.com



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CATCH COMMUNITY BANKING FEVER!



INDY
2026

