

CBAI's COMMUNITY BANK DIRECTORS' CONFERENCE



DECEMBER 7, 2026

Crowne Plaza, Springfield *and/or via*
On-Demand Recorded Session

Being a director of a community bank is both a challenging and rewarding experience. Directors have duties to their institution, stockholders and depositors, as well as responsibilities to the public at large. Meeting these obligations requires directors to be knowledgeable, active and prepared to make informed decisions.

With 2026 bringing another year of challenges and opportunities for community banks, CBAI's 2026 Community Bank Directors' Conference delivers timely topics and expert insights to help your board navigate today's banking environment and prepare for the future. **Choose the training option that works best for your board! Attend the conference in person or select the convenient on-demand option, with pricing designed to make training affordable for all your directors. The on-demand format allows directors to complete their training on their own schedules, while purchasing both options provides maximum flexibility. Both formats also offer opportunities to submit questions to the presenters. On-demand training will be available approximately 10 business days after the live event and remain accessible through March 31, 2027.**

This year's lineup features Philip Smith of Gerrish Smith Tuck, who explores what it truly means to serve on a bank's board; Deon Perryman of The Baker Group, who presents on asset/liability management; Doc Bodine of Gerrish Smith Tuck, who discusses planning for your bank's future; and Jerry Peck of CBAI, who delivers a legislative update.

CONFERENCE AGENDA

8:30 - 9 a.m.

Registration & Continental Breakfast

9 - 10 a.m.

"Association & Legislative Update"

Jerry Peck, SVP, Governmental Relations

CBAI, Springfield, IL

10 - 10:15 a.m.

Break/Sponsor Ads play

10:15 - 11:45 a.m.

"The Modern Community Bank Board: What Governance Really Means"

Philip Smith, Chairman & CEO

Gerrish Smith Tuck, Memphis, TN

What does it really mean to be a board member? Arguably, the job is fundamentally different than it was in the past, with heightened expectations, new technology coming at boards fast, new forms of competition, and dealing with often unwanted and unsolicited acquisition overtures. In this session you are provided with the tools to be a highly effective community bank board member in a changed environment and to better understand your key roles and obligations.

Philip Smith is the Chairman and Chief Executive Officer of the Board of Directors of the Memphis-based law firm of Gerrish Smith Tuck, PC, and its affiliated bank consulting firm, Gerrish Smith Tuck Consultants, LLC. Smith's legal and consulting practice places special emphasis on financial analysis, acquisition and ownership planning for boards of directors, strategic planning for boards of directors, regulatory matters, bank holding company formations and use, securities law concerns, new bank formations, S corporations, going private transactions, and other matters of importance to banks and financial institutions.

11:45 a.m. - 12:45 p.m.

Networking Lunch

Network with other directors and get their ideas on effective board meetings and what new challenges community banks and boards are facing.

12:45 - 2:15 p.m.

"Asset/Liability Management in Today's Environment"

Deon Perryman, Managing Director

The Baker Group, Springfield, IL

After an aggressive tightening cycle in 2022–2023 and 175 basis points of cuts in 2024 and 2025, the Federal Reserve changed direction again in September 2026, raising rates to combat inflation driven in part by higher energy prices. As we head into 2027, the banking industry faces fresh challenges: a 10-year Treasury above 5%; renewed pressure on deposit costs; a Fed chair who has stepped away from forward guidance; and continued geopolitical uncertainty. Community bank margins are near their strongest levels in years, but senior management must now prepare for rates that may stay higher, and move less predictably, than expected just a year ago. This session examines and discusses these concerns and presents strategies to better prepare your institution for the uncertainty ahead.

Deon Perryman is Managing Director with The Baker Group, one of the nation's largest independently owned securities firms specializing in investment portfolio management and interest rate risk management for community financial institutions. Perryman joined Baker in 2014, and his focus is liquidity management, regulatory guidance and investment portfolio strategy. His expertise is in assisting community institutions to develop an understanding of the current economic environment and to assist those institutions in utilizing that understanding to build business practices to best manage liquidity efficiently and improve value and earnings.

CONFERENCE AGENDA (CONTINUED)

2:15 - 2:30 p.m.

Break/Sponsor Ads play

2:30 - 4 p.m.

“Planning for your Bank’s Future (and Survival)!”

Doc Bodine, Managing Director

Gerrish Smith Tuck, Memphis, TN

Community banks face many challenges, from quickly evolving technology and customer expectations to uncertainty regarding regulatory requirements and demands. As the world changes rapidly beneath their feet, community banks must engage in efficient and productive planning for its present and future. This process must include strategic planning to guide the bank’s operations and succession planning to ensure that strong leadership in the form of stable ownership and qualified directors and management. These steps ensure that your bank will have the leadership and operations needed to navigate environmental challenges and avoid your bank becoming ripe for an unwanted acquisition. This session discusses sound approaches to strategic planning and succession planning that your community bank can utilize to ensure it achieves its objectives, maintains strong leadership and provides a strong financial performance (and return on investment) to its shareholders.

Cliston V. “Doc” Bodine, III, is the Managing Director of the Memphis based law firm of Gerrish Smith Tuck, PC, Attorneys, and Gerrish Smith Tuck Consultants, LLC. Bodine’s legal and consulting practice places special emphasis on compliance matters, bank regulatory matters, strategic planning, examination issues and appeals, enforcement actions (formal and informal), civil money penalties (“CMPs”), expense practices, incentive compensation issues, regulatory applications, removal and prohibition matters, bank insurance issues, corporate reorganizations, holding company formation and use, branch sale or purchase, corporate governing documents and practices, golden parachute payment and indemnification issues, and general banking and corporate law.

4 p.m. Adjourn

Prior to the seminar, you will be emailed a link containing hand-out materials, seminar certificate, evaluation form and seminar attendee list. Please print and bring materials with you or download them on your own device to access during the program. CBAI will provide power cords in several designated areas to charge devices.

The on-demand recording and handouts will be sent approximately 10-14 business days after the conference is conducted in person. For more information and questions regarding this conference, please contact Tracy McQuinn at 800.736.2224 or via email at tracym@cba.com.

CBAI is a public accountant continuing professional education sponsor by the Illinois Department of Financial and Professional Regulation. Contact CBAI for a certificate to submit.

DATE & LOCATION

December 7, 2026

Crowne Plaza (In-Person)

3000 S. Dirksen Pkwy

Springfield, IL 62703

217.529.7777

And/or via

On-Demand Recorded Session

Available through

March 31, 2027

REGISTRATION FORM

CBAI's 2026 Community Bank Directors' Conference

December 7, 2027 at Crowne Plaza and/or via On-Demand Recorded Session

Bank Name _____ Telephone # _____

Address _____

City, State, Zip _____

PRICING:

CBAI Member*

- ☐ \$299 First Registration (In-Person)
☐ \$169 Each Additional (In-Person)
☐ \$750 On-Demand Recorded Session (per bank)

Prospective Member**

- ☐ \$499 First Registration (In-Person)
☐ \$369 Each Additional (In-Person)
☐ \$1,500 On-Demand Recorded Session (per bank)

First Director Name/Email _____ Total _____

Additional Director/Email _____ Total _____

Additional Director/Email _____ Total _____

Additional Director/Email _____ Total _____

Additional Director/Email _____ Total _____

Grand Total _____

*Open to Associate Marketing Partners & Associate Member firms who sponsor at the minimum level
(this includes a free registration to the event, excluding social events associated with the program.)
Non-sponsoring Associate Members are not able to attend.

**Only financial institutions/firms are eligible for CBAI Membership.

Please select your payment method: ☐ Check Enclosed ☐ Check in Mail ☐ Pay at Door ☐ Credit Card*

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Card Number _____ Exp. Date _____ Security Code _____

FOR MORE INFORMATION

Tracy McQuinn, Senior Vice President, Education & Special Events
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