

INTRODUCTION TO INTERNAL AUDIT



June 23, 2026

**SHAZAM Education Center
CBAI Headquarters, Springfield, IL
or via On-Demand Recorded Session**

INTRODUCTION

If you are new to bank internal auditing or considering joining your internal department and looking for a course to help you in your career path, this one-day course provides that information. You learn the importance of this function in your financial institution and gain a basic understanding how to conduct an internal audit. The objectives of this seminar are to understand internal auditing, regulatory requirements and its purpose in your financial institution; understand the importance of independence of the internal audit function; review of a basic internal audit risk assessment and audit plan; and learn the practical application of the internal audit through use of internal audit programs and toolkits. New auditors or individuals considering becoming internal auditors benefit from attending this valuable program.

KEY TOPICS

- What is internal audit? Basic discussion of the process and performance standards
- The need for an independent internal audit
- Internal Audit Risk Assessment – the basics
- Conducting the internal audit – from preparing to reporting

AGENDA

- Registration begins at 8:30 a.m. with a Continental breakfast
- The seminar runs from 9 a.m. to approximately 4 p.m. with lunch provided.

Save the Date!



**CBAI's Advanced Internal Audit Seminar
Thursday, October 22, 2026**

MEET YOUR INSTRUCTOR

Traci Lohse, manager at Wipfli based in Sterling, Illinois, brings over 25 years of experience serving community banks. Lohse offers strategic consulting, CFO support, call report preparation, fractional CFO services and process improvement for institutions focused on growth and compliance.

Known for simplifying complex financial challenges, Lohse delivers actionable solutions and collaborates with bank leadership to enhance structure and workflows. She holds a bachelor's in accounting, an MBA in finance, is a Certified Internal Auditor (CIA), and a Certified Fiduciary & Investment Risk Specialist (CFIRS).



REGISTRATION FEES & INFORMATION

CBAI MEMBER

First Registration..... \$299

Each Additional Person.....\$279

On-Demand Recording.....\$525 per bank

PROSPECTIVE-MEMBER*

First Registration.....\$499

Each Additional Person.....\$479

On-Demand Recording.....\$1,050 per bank

CBAI Member pricing is available to bank and associate members. CDD members receive a 10% discount.

**Only financial institutions/firms eligible for CBAI membership.*

CANCELLATION POLICY

Registrants cancelling two days prior to each seminar receive a 100% refund; one day prior, 50%; the day of the seminar, no refund. *All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all "no shows."* Fees include handout materials, breakfast, lunch and refreshment breaks. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

TRAINING MATERIALS/ON-DEMAND RECORDED SESSION

Prior to the seminar, you will be emailed a link containing handout 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 locations to charge devices. **(NOTE: If you have NOT received the link one day prior to the seminar, please email Jennifer Nika at jennifern@cbai.com or call 217.529.2265)** The on-demand recorded session link will be emailed approximately 10 - 14 business days after the in-person event takes place. Your entire bank can utilize this session for training as it includes the recording from the day of the event and the same training materials.

CONTINUING EDUCATION

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider by the Illinois Department of Financial and Professional Regulation. If you have earned an ICBA Certification, CPE credit earned through your state banking association may be submitted for CPE purposes. Please note, approval is subject to review and must satisfy the respective certification requirements.

REGISTRATION FORM

INTRODUCTION TO INTERNAL AUDIT

____ June 23, 2026 ~ CBAI Headquarters, Springfield, IL

____ On-Demand Recorded Session

Bank Name _____ Telephone # _____

Address _____

City, State, Zip _____

First Registrant Name _____

First Registrant E-Mail _____ Title _____

Additional Registrant Name _____

Additional Registrant E-Mail _____ Title _____

I have special needs, please contact me before the seminar.

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. (Visa, MasterCard & Discover accepted.)*

Name as it Reads on Card _____

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Card Number _____ Exp. Date _____ Security Code _____

FOR MORE INFORMATION

Tracy McQuinn, Senior Vice President, Education & Special Events
Melinda McClelland, Senior Vice President, Career Development & Training
Jennifer Nika, Vice President, Education & Special Events
Tina Wilder, Administrative Assistant



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