

Bank Director[®]

Strong Board. Strong Bank.

MAY 5-6, 2025

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

Nashville, TN | *JW Marriott Nashville*



Early Rates Available!

Register by visiting BankDirector.com or calling our events department at 877-397-7595.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives



BankDirector® **Strong Board.** Strong Bank.

Early Rates Available!

Register by visiting BankDirector.com or calling our events department at 877-397-7595.



AN EXCLUSIVE EVENT FOR TODAY'S BANK EXECUTIVES



BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

As part of Bank Director's commitment to enriching and educating a bank's senior executive team, Bank Director has created the Bank C-Suite Summit. This two-day event is designed for senior bank executives seeking insights into bank operations and new growth strategies. During the event, attendees gain valuable knowledge and strategic tools to navigate the dynamic landscape of the banking industry.



Through a curriculum built for the entire leadership team, participants engage in comprehensive, executive-specific sessions that address the extraordinary responsibility all bank executives have in our increasingly complex industry and receive the tools necessary to strengthen their individual performance as well as that of their team. Topics such as risk management and auditing issues, compensation, corporate governance and strategic planning are covered during the Summit.



BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives



PRE-CONFERENCE EVENTS

Sunday, May 4

Before the Summit begins, attend one of three roundtables. Throughout the day, attendees receive a high-level view of specific topics facing an organization's leadership team. Participants have candid discussions in an intimate setting with their peers.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

CREATING A WORKPLACE OF EXCELLENCE

More than ever, banks need to adjust their talent and leadership development strategies to match the ever-accelerating pace of change in today's financial industry. During this roundtable, we provide constructive leadership sessions to help take participants — and the teams they lead — to the next level.

ROUNDTABLE

ROUNDTABLE AGENDA

**Agenda subject to change*

10:00 AM - 10:30 AM

Breakfast & Registration

10:30 AM - 11:30 AM

Creating a Workplace of Excellence

The workforce comprises many generations, from Baby Boomers and Millennials to Gen X'ers and even Gen Z'ers. What works for one group doesn't necessarily work for another. To kick off this roundtable, we discuss how to best create a workplace of excellence.

11:30 AM - 12:30 PM

Organizational Health

"The single greatest advantage any company can achieve is organizational health." However, it is ignored by most leaders. Why and how can you help to develop a healthy organization at your bank?

12:30 PM - 1:30 PM

Lunch

1:30 PM - 2:30 PM

Team Motivation

Motivating your team in the direction of the leader's vision is crucial. How can this be done and what does it take to get everyone moving in the right direction?

2:30 PM - 2:45 PM

Refreshment Break

2:45 PM - 4:00 PM

Aligning Culture & Strategy

Rob Camper, Chief Brand Officer, Finance. Risk. Unified.

Too often, there needs to be more alignment between the perceived culture and the reality across business lines. Culture ultimately drives the strategy of a company and thereby its future growth. How do you ensure there is alignment at your financial institution?

4:00 PM - 5:00 PM

Welcoming Peer & Guest Reception

To kick off the Summit, we invite all participants – and their guests – to join us for refreshments and light hors d'oeuvres.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

ALIGNING YOUR BANK'S DIGITAL STRATEGY

As your financial institution focuses on the future, decisions need to be made on where to invest time and money. But with the many options you could choose, what is best for your organization? As we prepare for the conference that follows, this roundtable provides a multifaceted approach to developing and integrating your bank's digital strategy with its overall strategic plan.

ROUNDTABLE

ROUNDTABLE AGENDA

**Agenda subject to change*

10:00 AM - 10:30 AM

Breakfast & Registration

10:30 AM - 11:30 AM

Creating a Strategic Plan Focused on Growth

Aaron Donaldson, Principal, Technology & Management Consulting, RSM US LLP

What has worked in the past may not support future plans. New competitors are continually changing the business of financial services. Since bank executives need to prioritize the issues and initiatives that will make a difference to their banks, this session lays out the new strategic imperatives for you and your bank to consider.

11:30 AM - 12:30 PM

Bringing the Digital Deposit Landscape Into Focus

Building a digital deposit strategy is imperative in today's financial marketplace. As consumers demand more digital offerings, financial institutions look to align consumer expectations and liquidity. This session considers the best practices to overcome obstacles and risks while staying relevant in a growing digital world.

12:30 PM - 1:30 PM

Lunch

1:30 PM - 2:30 PM

Customer Experience & Engagement

Matt Phipps, Chief Marketing Officer, Agent IQ

To build the best customer experience, you need to understand what's missing – and what's most important to your customers. In addition, ensuring internal teams are aligned is equally important before deploying or adding a new technology. During this session, we share lessons learned and best practices.

2:30 PM - 2:45 PM

Refreshment Break

2:45 PM - 4:00 PM

Data Sourcing and Why It's Important

Banks have a wealth of client data, but how is it best utilized to help the bank expand its existing relationships and provide a better customer experience? During this discussion, we explore opportunities to best integrate your bank's data into your digital strategy.

4:00 PM - 5:00 PM

Welcoming Peer & Guest Reception

To kick off the Summit, we invite all participants – and their guests – to join us for refreshments and light hors d'oeuvres.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

BUILDING SHAREHOLDER VALUE

How can you create the highest value for your bank — and its shareholders? Before the main conference, Bank Director hosts this roundtable to look at recent trends and uncover new growth opportunities your bank leadership team should consider.

ROUNDTABLE

ROUNDTABLE AGENDA

**Agenda subject to change*

10:00 AM - 10:30 AM

Breakfast & Registration

10:30 AM - 11:30 AM

Growth and M&A Strategy

The current economic climate has impacted most bank's organic growth and acquisition strategies. What has worked in the past may not support future plans. New competitors are continually changing the business of financial services. As we begin this workshop, we dive into the trends and issues facing banks' future profitability and review possible headwinds for the year ahead.

11:30 AM - 12:30 PM

Balance Sheet Growth & Risk Management

What areas should you focus on within your bank's balance sheet to identify growth opportunities – and unforeseen risks?

12:30 PM - 1:30 PM

Lunch

1:30 PM - 2:30 PM

IT Risks & Regulation

Banking is a risk-mitigation business. Learn about the new risks facing banks today and how financial institutions can best manage them.

2:30 PM - 2:45 PM

Refreshment Break

2:45 PM - 4:00 PM

Technology & Digital Strategies

During the workshop's last session, we dive into technology solutions and best practices to enhance customer experience and make better decisions to drive future growth.

4:00 PM - 5:00 PM

Welcoming Peer & Guest Reception

To kick off the Summit, we invite all participants – and their guests – to join us for refreshments and light hors d'oeuvres.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives



C-SUITE
S
DAY ONE
SUMMIT

Monday, May 5

On the first day of the Summit, attendees gain valuable insights and best practices from industry experts and peers in areas such as strategic planning, risk management, talent development, technology and marketing.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

SUMMIT AGENDA

**Agenda subject to change*

7:00 AM - 8:00 AM

Breakfast & Registration

8:00 AM - 8:05 AM

Day One Welcome

Michelle King, President, Bank Director

Laura Schield, Chief Operating Officer, Bank Director

Bank Director welcomes all attendees to this year's Bank C-Suite Summit in our hometown of Nashville, TN.

8:05 AM - 8:35 AM

The State of Our Industry

Kevin O'Keefe, Managing Director, Piper Sandler & Co.

In this session, hear the current state of the banking industry and the underlying factors driving change and creating opportunities for banks today.

8:35 AM - 9:05 AM

Harnessing Your Strategic Plan

Crafting and implementing an effective strategic plan for your bank involves thoughtful consideration, careful analysis and a deep understanding of your bank's internal processes, market dynamics, and competitive landscape. This session focuses on identifying and aligning your bank's key objectives with its overall mission, vision and values.

9:15 AM - 10:30 AM

Peer Exchanges: Session 1

A highlight of the Bank Director events, during the Summit banker participants are divided by similar titles, roles and responsibilities to candidly discuss and debate various topics and issues facing banks today. All peer exchanges are led by an industry advisor and are conducted in a closed-door, off-the-record setting.

Peer Exchange Topic 1: Technology Focused

Advised by: **Arjun Sud**, Principal, Data & Analytics, RSM US LLP

- Digital Strategy
- Talent: Building Your Team
- Making the Right Investment
- Integration Challenges
- Risk Considerations
- Due Diligence Best Practices

Peer Exchange Topic 2: Human Resource & Talent Focused

Advised by: Sean O'Neal, Partner, Chartwell Partners and Matt Brei, President, Blanchard Consulting Group

Advised by: Todd Carpenter, Senior Vice President, NFP Corp.

- Talent
- Compensation
- Succession Planning
- Developing the Next Talent Pool
- Incentive Compensation - does it align with your strategic plan?
- Creating Your Growth Plan: What's Next?

Peer Exchange Topic 3: Marketing Focused

- Data
- Products/Services
- CRM
- Niche Banking
- Branding
- Competition

Peer Exchange Topic 4: Finance & Risk Focused

Advised by: Aaron Taylor, CEO, Finance. Risk. Unified.

- Balance Sheet Management
- Growth Initiatives & Strategy
- Growing Organically
- Competitive Threats
- Making the Right Investments
- Risk Management
- Technology Budget: Impact on the Bank
- IT Risks
- Regulation

10:40 AM - 11:10 AM

Managing the Risks and the Balance Sheet

Speaker to be Announced, IntraFi

Additional Speakers to be Announced

Moderated by: Bill Herrell, Executive Vice President & Managing Director, Bank Director

From interest rate risk to unrealized losses and risk oversight, uncover industry insights and expertise about innovative strategies for mitigating risk and managing the balance sheet in today's dynamic banking environment. This session provides valuable perspectives from industry observers.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives



11:10 AM - 11:40 AM

Banking Trends & Challenges

Senior executives must understand the nuances of a dynamic banking industry by focusing on the latest trends and challenges faced by financial institutions of all asset sizes. This panel discussion explores the increasing adoption of digital banking solutions, the impact of technological advancements and the changing consumer expectations while addressing the challenges posed by cybersecurity, vendor management, regulatory compliance and the rising competition in the digital space.

11:50 AM - 12:30 PM

Breakout Sessions

Breakout 1: Driving Growth While Strengthening Bank Performance

In today's ever-changing financial landscape, bank executives play a crucial role in driving growth and improving profitability. This session examines essential strategies and best practices for optimizing financial performance, managing risk and navigating regulatory challenges.

Breakout 2: Succession Strategy Unpacked: Building Your Leadership Pipeline

Dr. Julie Bell, Director, Leadership Advisory, Chartwell Partners

This session gives you valuable strategies and insights into identifying and developing future leaders within your organization. Also, delve into best practices and practical approaches to succession planning, equipping you with the knowledge to ensure a seamless transition of talent within your bank. Whether you want to build a robust talent pipeline or enhance your current succession planning process, this session provides the tools and expertise to drive your organization's success.

Breakout 3: Embracing Marketing for Strategic Bank Growth

Dan Marks, President, Infusion Marketing Group

Many banks view marketing as a necessary expense rather than a strategic investment. However, in today's competitive financial landscape, effective marketing is essential for driving growth, building brand loyalty and attracting new customers. This session dispels the myths surrounding marketing and demonstrates its power as a strategic tool for banks.

Breakout 4: The New Roles of Bank Leadership

As the banking industry continues to evolve, so do the leadership roles within it. This session delves into the changing landscape of bank leadership and explores the emerging responsibilities that come with it.

12:30 PM - 1:30 PM

Networking Lunch

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

1:30 PM - 2:10 PM

Breakout Sessions

Breakout 1: Addressing Today's Top Banking Risks

Speaker to be Announced, CliftonLarsonAllen LLP

In this session, we examine the evolving landscape of cybersecurity, operational risk and compliance requirements facing the banking industry. Gain practical knowledge and actionable recommendations to safeguard your institution against emerging risks and ensure long-term resilience.

Breakout 2: Talent Development & Retention

Dara Klein, Managing Director, Kaplan Partners

Explore strategies for attracting top talent, fostering employee development and curating an environment that encourages long-term retention. This session highlights two bank human resources leaders who share their experiences navigating the complex dynamics around retention and talent management as keys to supporting your bank's continued growth and success.

Breakout 3: Using Data Strategically

Attracting and retaining existing customers is difficult. How do you leverage customer data to enhance bank sales initiatives? During this session, we discuss ways to better use existing data to expand relationships and cross-sell services that bring the most value to the bank's balance sheet.

Breakout 4: Leading Through Influence

Steve Mellor, Founder & Head Performance Partner, GrowthReady

Critical skills and strategies are needed to lead with integrity, including effective communication, building trust and inspiring others to action. Attendees gain practical insights into becoming more impactful and influential leaders to drive positive change within their teams and organizations.

2:20 PM - 2:50 PM

Strategies for Growth: Point/Counterpoint Debate

John Behringer, Partner, Risk Consulting, RSM US LLP

Kathleen Craig, Founder & CEO, Plinqit

Speaker to be Announced, Q2

Moderated by: Kiah Haslett, Bank Director

A favorite of Bank Director conference attendees, this session pits industry experts against each other to debate the most controversial issues in strategic growth. You don't want to miss this heated – and informative – session!

BankDirector® **Strong Board.** Strong Bank.

Early Rates Available!

Register by visiting BankDirector.com or calling our events department at 877-397-7595.



BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives



2:50 PM - 3:20 PM

Building the Best Team

Thomas Broughton, President & CEO, ServisFirst Bank
Jude Melville, Chairman & CEO, b1BANK
Jeff Sinnott, President & CEO, Vantage Bank
Moderated by: Michelle King, President, Bank Director

How do you create a high-performing team that drives results and fosters a positive work environment? In this session, hear from a panel of bankers who focus on strategies for understanding individual strengths, fostering effective communication, promoting collaboration and establishing trust within the team.

3:20 PM - 3:40 PM

Refreshment Break

3:40 PM - 4:55 PM

Peer Exchanges: Session 2

Building on the first round of peer exchanges, banker participants return to their same peer groups and attend the second round of peer exchange sessions facilitated by industry leaders.

4:55 PM - 6:00 PM

Networking Peer & Guest Reception

Participants engage in comprehensive, executive-specific sessions that address the extraordinary responsibility all bank executives have for our increasingly complex industry.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

C-SUITE
SUMMIT
DAY TWO

Tuesday, May 6

Day Two explores specific areas of interest for bank executives, covering topics such as regulatory updates, risk management, talent development, technology adoption and leadership strategies.

SUMMIT AGENDA

**Agenda subject to change*

7:00 AM - 8:00 AM

Breakfast

8:00 AM - 8:05 AM

Day Two Welcome

Michelle King, President, Bank Director

Laura Schield, Chief Operating Officer, Bank Director

As we begin day two of the Summit, Michelle and Laura reveal key findings from this year's Bank Director research and what is top of mind for most bank boards based on respondent feedback.

8:05 AM - 8:35 AM

Regulatory Update & Impact on the Bank

What are the latest regulatory updates and how do they impact our industry? During this session, learn about recent regulatory changes and how they influence bank operations, risk management and overall performance.

8:45 AM - 9:25 AM

Breakout Sessions

Breakout 1: Strategically Balancing Executive Compensation & Benefits

Mike Blanchard, CEO, Blanchard Consulting Group

Matt Brei, President, Blanchard Consulting Group

In this session, we explore the unique challenges HROs in financial institutions face regarding executive compensation and benefits, including executive salary structures, incentive programs, perks, and benefits packages. Gain insights into practical strategies that you can implement to align executive compensation with business goals and regulatory guidelines while ensuring competitiveness and fairness.

Breakout 2: Developing the Best Brand

Learn the fundamentals of brand development, strategies for building a solid brand identity and the importance of maintaining brand consistency across various channels. Gain valuable insights into enhancing your bank's brand reputation and establishing a strong market presence.

Breakout 3: Artificial Intelligence's Role in Your Bank's Future

Speaker to be Announced, nCino

Discover how financial institutions can harness the power of artificial intelligence and cloud technologies to develop cutting-edge solutions, modernize customer experiences, improve decision-making processes and fuel business growth.

BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

Breakout 4: Leadership in Crisis

This session explores the key elements of effective crisis management, including risk assessment, communication strategies, decision-making under pressure and maintaining stakeholder trust.

9:25 AM - 9:40 AM

Refreshment Break

9:40 AM - 10:55 AM

Peer Exchanges: Session 3

Banker participants return to their previous peer exchange groups for the third round of peer exchange sessions facilitated by industry leaders.

11:05 AM - 11:35 AM

Unraveling the Bank's Technology Budget: Understanding Its Impact

Given the digital strategies and amount of money spent by the largest financial institutions, community bank executives need to understand exactly how and where innovative technologies can help win and keep loyal customers, improve operational efficiency and enhance their overall cyber-security measures. By extension, decisions also include how much they might need to spend – and how to address the growing digital skills gap that might prove to be the achilles heel to any well-thought out plan.

11:35 AM - 12:05 PM

Lessons Learned: From the Branch to the Boardroom

Mike Sutton, SVP, Head of Retail Banking, Nicolet National Bank

Additional Speakers to be Announced

Moderated by: Naomi Snyder, Editor-in-Chief, Bank Director

Hear from a panel of bank leaders who discuss current banking trends, challenges and opportunities they have faced over their tenure. They share valuable insights and practical strategies for navigating from the branch to the boardroom. From innovative technologies to emerging business models, expect to gain valuable perspectives that can shape your bank's approach for the future.

12:05 PM - 12:10 PM

Closing Remarks

Michelle King, President, Bank Director



BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives



THANK YOU TO OUR SPONSORS!



**Finance.[™]
Risk.
Unified.**

Strategic Visibility.



BANK C-SUITE SUMMIT

An Exclusive Event For Today's Bank Executives

VENUE

JW Marriott Nashville

201 8th Avenue South

Nashville, TN 37203

Reservations: 629-208-8380

The JW Marriott Nashville embodies the energy and eclectic spirit of downtown Nashville. Slip inside the soaring 33-story glass tower and discover a whole new way to experience the city. Peruse a contemporary art collection that pays homage to the capital city's musical heritage, savor prime ribeyes at Bourbon Steak by Michael Mina, and unwind in Nashville's most luxurious guest rooms.

There is a discounted hotel room rate available for conference attendees at the JW Marriott Nashville until April 14, 2025 or until all rooms are reserved. To reserve a room, contact the hotel directly at 629-208-8380 and mention "Bank Director" to receive the discounted rate of \$349/night for a standard room.



CONFERENCE RATES

Early Individual Rate: \$1,995 (*Expires January 10, 2025. Payment must be received by offer expiration in order to receive the discounted rate.*)

Standard Individual Rate: \$2,295

Standard Group Rate: \$2,095 (*For groups of 2 or more from the same financial institution.*)

Sunday, May 4 | Pre-Conference Roundtables

Creating a Workplace of Excellence: \$995

Aligning Your Bank's Digital Strategy: \$995

Building Shareholder Value: \$995

Guest Rate: \$250 The guest rate of \$250 covers breakfast on Monday and Tuesday, as well as all evening receptions. Guests are not allowed to attend sessions. A guest is a spouse, significant other or friend who is not in a financial services occupation. A co-worker (even a spouse co-worker) or an associate within the financial services industry is not considered a guest.

Membership Program Conference Rates: If your bank is a participating program member, please contact 877-397-7595 to find out about special conference rates and/or event passes that may be available to you and your board. For questions or to find out more about Bank Director's membership program, please email bankservices@bankdirector.com.

Discounted Hotel Rate: There is a discounted hotel room rate available for conference attendees at the JW Marriott Nashville until Monday, April 14, 2025 or until all rooms are reserved. To reserve a room, contact the hotel directly at 629-208-8380 and mention "Bank Director" to receive the discounted rate of \$349/night for a standard room. Rooms are limited, so please book early!

Payments & Cancellation

Conference registration fees include admittance to all conference activities and access to the conference materials. Payment will be accepted by check, American Express, Visa, MasterCard or Discover. If paying by check, please make payable to DirectorCorps, Inc. and include the attendee's name(s) and/or a copy of the registration form and mail to:

Conferences
Bank Director
201 Summit View Drive, Suite 250
Brentwood, TN 37027

Due to commitments and expenses, all cancellations after March 17th will be subject to a \$300 processing fee. We regret that no refunds will be given after April 18, 2025; however, substitute participants are welcomed. DirectorCorps, Inc. assumes no liability for any nonrefundable travel, hotel or related expenses incurred by registrants.

BankDirector[®]
Strong Board. Strong Bank.

BankDirector.com

Register Today!

For more information
and to register,
please visit us online
at **BankDirector.com**
or call our events
department at
877-397-7595.