



MISSOURI
INDEPENDENT
BANKERS
ASSOCIATION

NEW FOR
2019!

CFO & CONTROLLER FORUM

MARCH 7, 2019

JULY 10, 2019

NOVEMBER 6, 2019

MIBA HEADQUARTERS

108 E. HIGH ST, SUITE B

JEFFERSON CITY, MO 65101

COURSE INTRODUCTION

The 2019 CFO/Controller Forum provides a platform for non-competing bank CFOs and controllers to exchange ideas freely, dissect problems, and discuss important issues with peers. Each group meets three times annually at the Missouri Independent Bankers Association headquarters. The agenda for each session will flow based on feedback from participants in the forum group. As necessary, subject matter experts will be brought in to cover specific issues and topics based on responses from the forum members. You will not want to miss this opportunity!

HOW IT WORKS...

- Groups are organized based on bank size and market to ensure that participants have as much in common as possible without being competitors. Additional groups may be added, depending on demand.
- The groups are small—no more than 15 bank CFOs/ controllers in a group. Due to the nature of the program, no substitutes are permitted unless by consent of the other participants.
- Each forum meets three times during the year.
- Five to seven topics are discussed at each session. Participants are strongly encouraged to suggest agenda topics of interest.
- Participants get the benefit of working with industry experts on a cost-saving basis.
- A binder containing forum handout materials is provided for each group member.
- Members can exchange ideas and network between meetings.

SAMPLE TOPICS

- Financial reporting issues: Effective planning/budgeting; getting your board members the information they really need, current accounting topics
- Profitability issues: Measuring customer profitability; bank-wide pricing discipline; margin maintenance; product profitability; deposit pricing
- Personal growth: The CFO/controller as a leader in the bank; time management; setting priorities effectively
- People issues: Recruiting; retaining and compensating financial personnel; coaching for performance; personal improvement plans; motivating long term employees
- Regulatory issues: ALLL methodology; assessing your bank's risks and financial controls
- Vendor issues: The CFO/controller role in vendor assessment; negotiating and managing vendor contracts
- Emerging issues/other issues: Investment strategies; ALCO issues; analyzing technology investments and their risks; insurance and bank risk management; emerging FASB issues

SCHEDULE OF EVENTS

- 8:00 AM- Breakfast
- 9:00 AM- Forum Begins
- 12:00 PM- Lunch
- 3:00 PM– Forum adjourns

BENEFITS

- Improve your effectiveness as CFO/Controller
- Learn from your peers what's working and what's not in bank financial management
- Improve the efficiency of your bank's financial function
- Form lasting relationships with other CFOs
- Gain insight into your most pressing accounting and finance concerns
- Obtain access to highly respected industry experts
- Grow professionally as well as personally

ABOUT THE PRESENTER: KARL NELSON



Karl Nelson is the founder and CEO of KPN Consulting. His career has included senior positions with IDC Deposits and Promontory Interfinancial Network. In addition, Karl served as a senior vice president with the Federal Home Loan Bank of Atlanta from 1991 through 2002, where he managed the sales and marketing, strategic planning, and trade association/regulatory outreach efforts and served on the bank's ALCO. Prior to joining the Home Loan Bank, he was involved for 18 years with various regional banks. Karl serves on the faculties of the Graduate School of Banking in Madison, Wisconsin and Boulder, Colorado, the Graduate School of Bank Investments & Financial Management in Columbia, South Carolina as well as the faculties of the state banking schools in Florida and Tennessee. He is also a past chairman of Neighborhood Lending Partners Inc., a Community Development Financial Institution serving the affordable housing and community revitalization needs for communities in the state of Florida. Karl was an organizing Director and former ALCO Chair for a de novo bank in North Carolina and consults regularly with community bank Boards and Management on business strategies.

REGISTRATION FORM

Name of Bank: _____

Address: _____

City, State, Zip _____

Phone #: _____

Attendee/Title: _____

E-Mail: _____

Attendee/Title: _____

E-Mail: _____

Payment Method:

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Credit Card*

*If you are paying by credit card, please fill out the following information

Name on Card: _____

Billing Address: _____

Card Number: _____

Exp Date: _____ Security Code: _____

There will be a 3% Convenience Fee for credit card payments

PRICING:

****MIBA MEMBERS ONLY****

FEE: \$995 (ALL 3 SESSIONS)

**FEEs INCLUDE: COURSE
MATERIALS, LIGHT
BREAKFAST, REFRESHMENT
BREAK AND LUNCH**

HOTEL RESERVATIONS CAN BE MADE

AT:

- **DOUBLETREE BY HILTON HOTEL**
573.636.5101

OR

- **CAPITOL PLAZA HOTEL**
573.635.1234

**PLEASE REFERENCE GROUP NAME:
MISSOURI INDEPENDENT
BANKERS ASSOCIATION**



Please Remit form & payment information to:

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