



KANSAS BANKERS
ASSOCIATION

2020 ECONOMIC OUTLOOK AND RISK MANAGEMENT CONFERENCE

NOVEMBER 4-5, VIRTUAL

WHO SHOULD ATTEND?

This program is designed for CEOs, CFOs, COOs, Presidents, Investment Managers, Bank Directors, and anyone involved in managing risk for the bank. Recommended 11.5 hours CPE credit.



PROGRAM HIGHLIGHTS

- Beyond the Pandemic and After the Election: Issues, Challenges and Strategies to Grow your Business over the Next Two Years
- Strategic Plans, Capital Plans and Risk Appetite: How to Fit Them Together in a COVID World
- Managing the Downturn: Best Practices in ALM
- Creating Funding Stability During Uncertain Times
- Managing Risk Without Breaking the Bank: A Benchmarking Update
- Leadership in the Era of Digital Transformation
- The 2020 Recession: Just how bad it is, and when will it end?
- The One Compass - Coach & the Cowboy

Wednesday, November 4

8:45 a.m. – 9:00 a.m.

Begin logging in

9:00 a.m. – 10:45 a.m.

Welcome, Opening Remarks and Sponsor Recognition

Jonathon Johnson, KBA Chairman

Opening General Session

Beyond the Pandemic and After the Elections: Issues, Challenges and Strategies to Grow your Business over the Next Two Years

Gene Marks, The Marks Group, P.C.

Sponsored by the KBA/NBA Schools of Banking

If you're running a business, then no doubt 2020 has turned into a very challenging year for you. You're faced with many obstacles that are not only impacting your current cash flow but your longer-term strategies for growth. What decisions should you be making now? What are smart leaders around the country doing to navigate their companies, their employees and their partners towards growth and profitability over the next two years?

10:45 a.m. – 11:00 a.m.

Break and Sponsor Recognition

11:00 a.m. – 12:00 p.m.

General Session

Strategic Plans, Capital Plans and Risk Appetite: How to Fit Them Together in a COVID World

Peter Weinstock, Hunton Andrews Kurth LLP

In response to the pandemic, financial institutions should adopt robust strategies to address prospective asset, capital and regulatory issues. Mr. Weinstock will reflect on capital, accounting, liquidity, stress testing, earnings, people, and examination considerations that every bank must keep top-of-mind in light of the economic headwinds. By attending this session, you will obtain the information and insights to hone risk management and capital planning skills in order to protect the bank's interest through to a recovery.

12:00 p.m. – 12:45 p.m.

Lunch Break

12:45 p.m. – 1:15 p.m.

Program

Doug Wareham, KBA President & CEO

1:15 p.m. – 2:15 p.m.

Breakout Sessions (choose one)

1. Managing the Downturn: Best Practices in ALM
Dennis Zimmerman and Matt Maggi, Commerce Bank
Interest rates continue to hover near historical lows while forward guidance implies that Fed policy makers anticipate keeping benchmark rates near zero through 2022. Time has come for bankers to proactively manage their balance sheets to mitigate margin compression normally associated with an economic downturn. The session will focus on both sides of the balance sheet; special attention will be given to bond portfolio and liquidity management. Those attending this session will leave with an increased understanding of ALM best practices as related to effectively managing bank earnings and capital regardless of the actual stage in the business cycle.
2. Creating Funding Stability During Uncertain Times
Lance Caldwell, Promontory Interfinancial Network, LLC
Banks face so many challenges associated with developing and implementing funding strategies. Many variables, such as

depositor options/behaviors and regulatory, economic and rate uncertainties, can complicate your bank's funding strategies. Today's dynamic funding environment is forcing banks to frequently assess surroundings from an economic, competitive and regulatory standpoint.

3. **Managing Risk Without Breaking the Bank: A Benchmarking Update**

John Meyer, Cornerstone Advisors

New regulations are forever heading our way, preparing to kick us where it counts. Move past the "regulations are burdensome" handwringing and explore how banks can more efficiently and effectively absorb new compliance mandates without soaking up all the earnings.

2:15 p.m. – 2:30 p.m.

Break and Sponsor Recognition

2:30 p.m. – 3:30 p.m.

Breakout Sessions - Repeated

3:30 p.m. – 3:45 p.m.

Break and Sponsor Recognition

3:45 p.m. – 5:00 p.m.

Leadership in the Era of Digital Transformation

Joe Sullivan, Market Insights

Digital leaders must blend traditional skills with new competencies that help foster an environment for all employees to adopt and thrive. New approaches to learning, recognition, use of physical space, etc. must be taken. New ways to structure teams and deploy capital must be considered. And senior leaders must share a vision for how technology can improve their bank's competitive position.

Thursday, November 5

8:15 a.m. – 8:30 a.m.

Begin Logging in

8:30 a.m. – 10:45 a.m.

General Session

The 2020 Recession: Just how bad is it, and when will it end?

Dr. Ed Seifried, Seifried & Brew

Sponsored by Bajillion

The depth and speed at which the COVID-19 US Recession struck the economy is unprecedented. It is likely the 2020 economic collapse will be deeper than any economic downturn since World War II. Dr. Ed plans to catalog the economic damage done by this pandemic, describe the monetary and fiscal policies implemented to end the downturn, and most importantly, attempt to determine, when the recover begins, the economy will follow the path of one of the following suggested recession possibilities: The "V", "U", "W", or "L" shaped recovery.

10:45 a.m. – 11:00 a.m.

Break and Sponsor Recognition

11:00 a.m. – 12:00 p.m.

Closing General Session – *The One Compass – Coach & the Cowboy*

Kevin Chase and Brandon Clark will take you through The One Compass; a culture driven by 4 points of direction, which we call ACES: Accountability – this is the beginning process of setting goals and aspirations; Character – is who you are, holding oneself to high moral character is foundational to life successes; Energy – through all of life's ups and downs, there is one thing that we can control and that is our attitude; Service – to serve is to love and to love is to live. The meaning of life is to find your purpose. Your purpose in life, is to give it away.

12:00 p.m.

Adjournment

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2019-2020 Bank Management Committee.....

- Mike Cearley, Chair – Centera Bank, Sublette
- Janet Lowell, Vice Chair – Central National Bank, Manhattan
- Patrick Bolen – Bank of Prairie Village, Prairie Village
- Ryan Commerford – The Bennington State Bank, Salina
- Mike Day – Denison State Bank, Holton
- Charles Derby – First State Bank & Trust, Lawrence
- Craig Heideman - Kaw Valley Bank, Topeka
- Josh Hoppes – Mutual Savings Association FSA, Leavenworth
- Vance Keller – First National Bank, Syracuse
- John Kilroy – UMB Bank NA, Kansas City
- Shawn Lancelot – Bank of America, Wichita
- Matt Needham – CrossFirst Bank, Leawood
- Brandon Nordhus – Community National Bank, Seneca
- Suzan Saville – FHLBank, Topeka
- Patrick Smith – BOK Financial Securities, Overland Park
- Chris Wente – Golden Belt Bank FSA, Hays
- Steve Worrell – Vintage Bank Kansas, Wichita

Take Advantage of the Mobile App

KBA is excited to utilize their association-wide mobile app for the conference again this year. It will contain information on speakers, sponsors, presentations, session schedules and much more.

It is accessible from mobile devices such as smartphones and tablets. No matter your mobile device, you are two steps away from having the Risk Management Conference at your fingertips. Registrants will receive specific instructions and details approximately one week prior to the conference.

2019-2020 Officers.....

Jonathon Johnson
Chairman
Home Savings Bank
Chanute



Mike Ewy
Chair-Elect
Community State Bank
Coffeyville



Shan Hanes
Vice Chair
Heartland Tri-State Bank
Elkhart



Kurt Knutson
Past Chairman
Freedom Bank
Overland Park



**KANSAS BANKERS
ASSOCIATION**

SPEAKER INFORMATION



Lance Caldwell

Managing Director, Promontory Interfinancial Network

Mr. Caldwell is a Managing Director for Promontory Interfinancial Network. He provides balance sheet management support to Network members across the states of Kansas and Missouri. Lance previously served as a Managing Examiner for the Federal Reserve Bank of Kansas City, a Lending Officer for Federal Home Loan Bank Topeka, and an Association National Bank Examiner for the Comptroller of the Currency.



Kevin Chase

Coach and the Cowboy, LLC

Mr. Chase has a vast career and background from banking to coaching to now public speaking. Raised in Towanda, Kansas and attended K-State University graduating with a BS in Animal Science & Industry. Kevin has a banking career that expands over 28 years starting at Bank IV, Wichita and ending his banking career at First National Bank of Derby AKA Verus Bank with the title of Chairman & CEO. Once retired from banking he started a new career in Coaching at the high school level creating a culture program – One Degree Compass.



Brandon Clark

Coach and the Cowboy, LLC

Mr. Clark was raised in Valley Center, Kansas and attended Kansas State University and graduating with a BS in Business and Computers Education as well as Baker University's Graduate School of Administration and Leadership. Brandon was a teacher for 17 years at Derby High School and a coach for basketball, track, and football. After leaving his teaching and coaching career, he partnered with Kevin Chase and created Coach and the Cowboy, LLC.



Matthew Maggi

Vice President, Commerce Bank Capital Markets Group

Prior to joining CMG in 2016, Mr. Maggi was the Corporate Treasurer at a \$1.2 billion publicly traded Community Bank headquartered in Missouri. During his tenure, Matthew developed and implemented balance sheet strategies to maximize margin while managing acceptable levels of interest rate risk, liquidity, and capital. He not only managed the investment portfolio, but also conducted extensive loan portfolio performance analyses. Matthew is registered as a Municipal Securities Representative and Government Securities Representative with the Board of Governors of the Federal Reserve System. He received a Master of Business Administration from Rockhurst University and a Bachelor of Business Administration from Baker University.



Gene Marks CPA

President & CEO, The Marks Group, P.C.

Mr. Marks is a former daily columnist for both the New York Times and Washington Post, Gene now writes weekly on small business, public policy and technology for The Guardian, The Washington Times, The Hill, The Philadelphia Inquirer, Forbes, Entrepreneur and Accounting Today. Mr. Marks helps business owners, executives and managers understand the political, economic, and technological trends that will affect their companies so they can make profitable decisions. Prior to starting the Marks Group PC Gene, a Certified Public Accountant, spent nine years in the entrepreneurial services arm of the international consulting firm KPMG.



John Meyer

Senior Director, BI/Data Analytics Practice Leader, Cornerstone Advisors

Mr. Meyer is a Senior Director, BI/Data Analytics Practice Leader for Cornerstone Advisors. Prior to joining Cornerstone, John spent 7 years at Abrigo as the Chief Strategy Officer and Chief Product Officer, where he oversaw the development of a BSA/AML solution used by over 1,000 US community financial institutions, an ALLL/CECL solution used by over 1,200 institutions, and an Asset Liability Management platform used by over 300 institutions. John has an MBA with a concentration in Management and Marketing of High Technology from University of Washington. He also has a BS in Latin American Studies and System Engineering from the United States Military Academy, West Point.



Dr. Edmond J Seifried

Professor, Executive Consultant and Chief Economist

Dr. Seifried has touched the hearts and minds of almost every director and CEO of community banks across the nation. Ed is a valued educator for community bank directors, CEOs, senior management, and up and coming community bankers. Dr. Seifried provides a unique, simplified approach that will help your audience through the maze of economic indicators and financial news releases. His presentation offers easy-to-follow directions on how to recognize key economic signals and prepare strategies to cope with the changing economic environment. His focus is on the United States economic prospects for the new millennium and ways for each industry to capitalize on foreseen trends.



Joe Sullivan

CEO, Market Insights

Mr. Sullivan is the CEO and Founder of Market Insights, Inc. As a consultant, author and professional speaker with more than 30 years of experience, the themes of growth, innovation and motivation can be found throughout Joe's work. Joe's passion, energetic style and practical approach engages his audiences and consistently makes him a top-rated speaker. His unique perspective comes from working side-by-side with executives and marketers around the U.S. in the development of successful growth strategies.



Peter Weinstock

Partner, Hunton, Andrews Kurth

Mr. Weinstock, the past several years, has devoted substantial time to strategic planning, bank compensation and defense of enforcement matters, including concerning fair lending and BSA. He is the Practice Group Leader of the Financial Institutions Section. Peter has counseled institutions on more than 375 M&A transactions, hundreds of securities offerings, including over a dozen IPOs, and capital planning, over 50 de novo banks and hundreds of administrative and other enforcement actions. He was a guest lecturer for Harvard's Kennedy School of Public Policy in Beijing, China in 2017 and 2018.



Dennis Zimmerman

Senior Vice President, Commerce Bank Capital Markets Group

Mr. Zimmerman offers a comprehensive understanding of bank finance treasury, fixed income, complex financial analysis as well as regulatory and operational awareness. As a banker, he understands the challenge of balancing shareholder expectations within the confines of acceptable levels of risk. He is registered as a Municipal Securities Principal and Government Securities Principal with the Board of Governors of the Federal Reserve System. Dennis holds a Bachelor of Arts, Business Administration, and Economics for Kansas Wesleyan University.



KANSAS BANKERS
ASSOCIATION

ECONOMIC OUTLOOK AND RISK MANAGEMENT CONFERENCE
SPONSORS/EXHIBITORS

Platinum Level



Gold Level



Silver Level



Bronze Level



BANKERS' BANK
OF KANSAS



THANK YOU!

Registration Information

Pricing is done on a per bank basis. Pay once and train as many employees as you like!

	Earlybird registrations postmarked <u>on or before Sep. 29, 2020.</u>	Registrations postmarked <u>after Sep. 29, 2020.</u>
Member Pricing (per bank):	\$325 Assets \$100M or less \$650 Assets \$101M to \$500M \$900 Assets over \$500M	\$350 \$675 \$925
Non-Members (per bank):	\$1250	\$1275
Associate Members (per bank):	\$650	\$675

* Fee includes instruction and training manual.

* We understand that circumstances arise requiring cancellation -

If you cancel up to 3 business days before the program, your registration fee will be refunded.

* If you have a disability, and request special accommodations, please contact the KBA office.

* Registration for and attendance at KBA meetings and events constitutes an agreement by the registrant for KBA's use of the attendee's photograph in printed and/or digital promotional materials, publications, mobile app and social media, unless permission is revoked in writing and received by the KBA prior to the event.

REGISTRATION FORM

ECONOMIC OUTLOOK AND RISK MANAGEMENT CONFERENCE



Registrant Name	
Bank Location	E-mail:
Registrant Name	
Bank Location	E-mail:
Registrant Name	
Bank Location	E-mail:
Registrant Name	
Bank Location	E-mail:

Bank _____ Total Attending _____

PO Box _____ Total Enclosed \$ _____

City, State, Zip _____

Three ways to register:

1. Complete and mail registration form with payment.
2. Fax or email registration form, followed by mailing of payment.

Please use this form as your invoice.

3. Register online using a credit card @ www.ksbankers.com

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