

# 2025 EXECUTIVE FORUMS

\*Forums are for TBA Bank Members only\*



Join a community of fellow banking officers to exchange ideas, dissect challenges and discuss important issues.

## HOW IT WORKS

Take advantage of this exclusive opportunity and apply to join other executive-level banking professionals in thought-provoking conversations specific to your management role. There are four separate Forums that cater to different executive positions: CEO, CFO, Senior Lender, and IT/Security Officers. Your facilitator will encourage everyone to submit topics of interest prior to each session to further customize discussions.

## WHAT'S IN IT FOR YOU?

Improve your effectiveness in your role and solve your most pressing concerns. Obtain access to highly respected industry experts, expand your personal and professional growth and form lasting relationships with your peers.

## WHEN AND WHERE

Each Forum meets three times per calendar year for one day. Meetings will be held in Austin. The CFO, Senior Lender and IT/Security Forums are broken into two groups based on bank asset size and market. If your registration is approved for 2025, you will be assigned your group by TBA staff to ensure that topics are relevant to you and competition is minimal.

### IT & Security Forum

Group 1: March 25, July 29, Nov. 5  
Group 2: March 26, July 30, Nov. 6

### CFO Forum

Group 1: March 12, July 9, Nov. 5  
Group 2: March 13, July 10, Nov. 6

### Senior Lender Forum

Group 1: March 10, July 7, Nov. 3  
Group 2: March 11, July 8, Nov. 4

### CEO Forum

March 14, July 11, Nov. 7

## POTENTIAL DISCUSSION TOPICS

### Information Technology and Security Officers

- Cybersecurity
- Regulatory Guidance
- Security Controls
- IT Regulatory Examinations
- Business Continuity
- Incident Response Testing
- Vendor Management
- Current Hot Topics

### Chief Executive Officers

- Profitability Strategies
- Branch Issues
- Regulations
- Asset-Liability
- Technology
- Succession Planning
- Recruiting Lenders
- Board Productivity
- Organizational Structure

### Senior Lenders

- Portfolio Management
- Effective Loan Grading
- Customer Segmentation
- Competition
- CECL
- Sales Negotiation
- Exam Experiences
- Leadership Skills

### Chief Financial Officers and Controllers

- Financial Reporting
- Margin Maintenance
- ALLL Methodology
- Leadership
- CECL Implementation
- Fraud Issues
- Vendor Management
- Cybersecurity

"The Senior Lender forum is a great place to network with Senior Lenders, Presidents, CLOs, and CCOs from banks around Texas. It is a place to come share and learn best practices, gain references on vendors, and discuss current events affecting the banking industry.

— Nick Fox, SVP, Commercial Bank Director, B1Bank

"I am most impressed with the level of participation from all in attendance. It is a little overwhelming to be in a room with such smart people. Very worth my time."

— Tony Cook, EVP, Chief Operations Officer, City National Bank

## REGISTRATION

### Registration fee: \$1,200

Forums are for TBA Bank Members only. The registration fee includes all three sessions. Submit this form to [education@texasbankers.com](mailto:education@texasbankers.com) and await your notification of approval and assigned group dates. You will not be charged until you are accepted into the program.

## CANCELLATION POLICY

The price includes all three sessions. A full refund for the Forum will be given for cancellations received

**5 days prior to the first session.** Substitutions for any of the three sessions are welcome at no additional charge. Refunds for individual forum sessions will not be given.

## LOCATION

TBA Headquarters, 203 W. 10th Street, Austin, TX 78701

## NEARBY HOTELS

TBA has secured a corporate rate for the following hotels:

**Stephen F Austin Royal Sonesta Hotel**  
<https://bit.ly/StephenFAustinTBAhotel>  
701 Congress Avenue, Austin, TX 78701

**Hyatt Centric Congress Avenue Austin**  
<https://bit.ly/HyattCentricTBAhotel>  
721 Congress Avenue, Austin, TX 78701

**The Driskill**  
<https://bit.ly/HyattDriskillTBAhotel>  
604 Brazos Street, Austin, TX 78701

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## REGISTRATION FORM

Apply online or complete a separate form for each registrant.

Email: [education@texasbankers.com](mailto:education@texasbankers.com)

Mail: Texas Bankers Association  
PO Box 2569  
Austin, TX 78768-2569

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- IT & Security Forum     CEO Forum     CFO Forum     Senior Lender Forum

Name  Mr.  Ms.

First Name for badge

Title

Bank/Company

Business Address

Mailing Address (If different from above)

City/State/Zip

Phone

Email

Please note any special accommodations below (i.e. ADA, food allergies, dietary requests, etc.)

To expedite your registration, please include any other names you have used (i.e. maiden name, formal name or nickname) and, if applicable, any other financial institutions you have previously worked for.

Other Names

Other Financial Institutions