

# 2024 Executive Forums



TexasBankersAssociation  
Strong Banks. Stronger Communities.

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

\*Forums are for TBA Bank Members only\*

## 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 2024, 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 26, July 9, Nov. 12

Group 2: March 27, July 10, Nov. 13

### CFO Forum

Group 1: March 20, July 17, Nov. 6

Group 2: March 21, July 18, Nov. 7

### Senior Lender Forum

Group 1: March 18, July 15, Nov. 4

Group 2: March 19, July 16, Nov. 5

### CEO Forum

March 22, July 19, Nov. 8

## 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

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"I have attended the CEO Forum group for a number of years. Due to the value I receive, I would consider it irresponsible, both professionally and personally, to not continue."

— Todd Moore, Chairman / CEO, Alliance Bank Central Texas

"The TBA IT and Security Forums are unique opportunities for IT and Security leaders from Texas financial institutions to share information, discuss technology challenges and solutions, and establish valuable relationships with peers. I find each meeting engaging and thought-provoking."

— Darrell Bateman, CISO, City 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:  
<https://bit.ly/TBAAustinHotels>

**The Otis Hotel** (1.5 miles to TBA)  
\$309/night  
1901 San Antonio St., Austin 78705

**AC Hotel Austin – University** (1.5 miles to TBA)  
\$239/night  
1901 San Antonio St., Austin 78705

**Moxy Austin – University**  
\$219/night  
2552 Guadalupe St., Austin 78705

**Holiday Inn Town Lake** (2 miles to TBA)  
<https://bit.ly/HolidayInnATXTownLake>  
\$139/night  
20 N IH 35, Austin 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