

February 16-17, 2018

Westin Kierland Resort  
Scottsdale AZ

# 2018

NDBA/SDBA  
Bank Management  
Conference



Banking Trends | Leadership | Culture

For Bank Presidents, CEOs,  
Senior Management & Directors



# You Are Invited

This year's **2018 NDBA/SDBA Bank Management Conference** will provide executive level officers, bank directors and senior level bankers with timely insights on the economic landscape, balance sheet management, building a culture of success, FinTech opportunities, and crisis leadership.

Bankers value strategic information and networking with colleagues and the Bank Management Conference offers plenty of both, in addition to some of the best hospitality Arizona has to offer. We look forward to seeing you in Scottsdale.



*Steve W Rehovsky*

Steve Rehovsky  
NDBA Chairman



*Dave Rozenboom*

Dave Rozenboom  
SDBA Chairman

## Agenda

### Friday, February 16

**7:00 a.m. A Hearty Breakfast**  
for bankers and business partners

### 7:45 – 11:15 a.m. GENERAL SESSION

#### “The Amazon Prime Effect”

[Dave DeFazio, StrategyCorps](#)

Subscription services are quickly becoming the dominate strategy of today's best retailers and have caused a monumental shift in the way people buy. More than 50% of all American households now subscribe to Amazon Prime and more than 200 million people subscribe to this and other retail services such as Netflix, Spotify, and Dollar Shave Club. Bankers have a duty to understand these trends and drive their institution beyond transactions to connect better with the lifestyles of today's consumers.

#### “The Future of Banking: Leveraging FinTech”

[Rob Morgan, American Bankers Association](#)

Financial technology innovations are fundamentally changing the ways banks interact with their customers. ABA offers resources to help banks identify financial technology trends and deliver innovative customer solutions.

#### “Branch Transformation Strategies: Combining Technology & Human Interaction for an Intelligent Experience”

[Anthony Burnett, LEVEL<sup>5</sup>](#)

As younger customers rapidly adopt new self-service technologies, creating a personal experience for each customer has never been more important. Now more than ever, community institutions need to effectively manage the costs of acquiring new customers while servicing existing accounts. They must also manage costs across a multi-channel network.

**12:30 p.m. Golf Tournament or Free Afternoon**

**6:30 – 9:00 p.m. Gala Reception and Dinner**  
for all registrants

### Saturday, February 17

**7:15 a.m. Continental Breakfast**  
for bankers and business partners

### 8:00 – 11:30 a.m. GENERAL SESSION

#### “Balance Sheet Management and the Cycles of Banking”

[Jeff Caughron, The Baker Group](#)

As we transition into a new year, bankers are faced with rising short-term interest rates, a flattening yield curve and tighter liquidity conditions. New leadership at the Fed looks likely to lessen the burden of regulations on banks but also to continue the monetary tightening. This session will focus on optimal balance sheet management with a focus on liquidity risk, interest rate risk, and investment strategies that make sense in the current environment.

#### “Creating a Shared Commitment of Success”

[Karie Stupek, K-T Training Solutions](#)

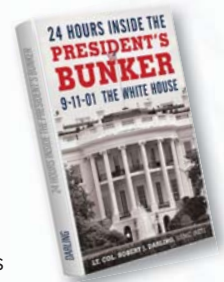
Today's workplace bears little resemblance to the traditional workplace. A new generation has charged forward demanding change in how we engage, motivate and retain future leaders. It's about more than just “those Millennials”; it's about acknowledging the changing needs and desires of a young group of individuals with different perceptions of job satisfaction and career advancement. It's about creating a healthy workplace culture across the generations that embodies a shared commitment of success.

#### “September 11, 2001 – The White House: A Crisis Leadership Presentation”

*Spouses and guests are invited to attend.*

[Lt. Col. Robert Darling, United States Marine Corps \(Retired\)](#)

On September 11, 2001, Lt. Col. Darling was working in the White House Military Office and was initially tasked to coordinate airlift assets for the President's evacuation. However, he was quickly recruited to provide his military expertise and became a key liaison between the Vice President, National Security Advisor and the Pentagon and worked directly with the National Command Authority to respond to the terrorist attacks. Lt. Col. Darling witnessed first-hand the enormity of the crisis leadership decisions made that day on behalf of all Americans.



**11:45 a.m. A Delicious Outdoor Luncheon**  
for all full registrants

**Afternoon Free time**

**5:30 – 6:30 p.m. Casual Cocktail Reception**  
followed by dinner on your own



# Featured Speakers



**Anthony Burnett**  
LEVEL<sup>5</sup>  
Atlanta GA



**Jeff Caughron**  
The Baker Group  
Oklahoma City OK



**Lt. Col. Robert J. Darling**  
U.S. Marine Corps (Retired)  
Stafford VA



**Dave DeFazio**  
StrategyCorps  
Brentwood TN



**Rob Morgan**  
ABA  
Washington DC



**Karie Stupek**  
K-T Training Solutions  
Scottsdale AZ

# Spouse | Guest Special Programs

## Friday, February 16

**8:45 – 11:00 a.m.**

### Breakfast and “Cheese 101” Class

Indulge in a morning of food and fun! Gather with friends for a fabulous breakfast. Then, join food stylist and culinary artist Ellen Straine for an adventure in cheese tasting, pairing cheeses with sweet and savory condiments, creating a cheese tray that will look beautiful and taste fabulous, and tasting some of the best breads Phoenix has to offer.



## Saturday, February 17

**10:30 – 11:30 a.m.**

### “September 11, 2001 – The White House: A Crisis Leadership Presentation”

See description under Saturday’s “General Session” listing.

# Sponsors

## PLATINUM SPONSORS



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# About the Resort



## The Westin Kierland Resort & Spa

6902 E. Greenway Parkway  
Scottsdale AZ 85254  
Phone: 800.354.5892  
[www.kierlandresort.com](http://www.kierlandresort.com)

### Reservations

**Group Room Rate: \$309**

Deadline: January 22

*Cancellations within seven days of arrival will be charged one night's deposit.*

Reservation link: <http://bit.ly/2h7lg5d>

# Golf Tournament

## Westin Kierland Golf Club • Friday, February 16 • 12:30 p.m.

*Pre-registration required.*

Please see separate form to register for golf and to reserve Ping rental clubs.

Kierland Golf Club provides three 18-hole combinations. Acacia, Ironwood and Mesquite offer three championship-style nines – each with its own flavor and strategy. Emerald green fairways are etched into golden-colored desert grasses, sweeping over constantly changing elevations to flawless greens. *Honored as one of the "Top 10 Public Courses in Phoenix/Scottsdale."*



# Helpful Tips

## What to Wear

The average high temp for February is 70 and the average low is 43. Meeting attire will be business casual – no ties necessary. For the reception and dinner Friday night, men may feel more comfortable wearing a sport coat with an optional tie. Women may prefer warmer dress and a light jacket or sweater for the cool desert evenings.

## Time Zone

Arizona is on Mountain Standard Time.

## Questions?

Contact Dorothy Lick  
SVP of Education  
North Dakota Bankers Association  
701.223.5303  
[dorothy@ndba.com](mailto:dorothy@ndba.com)



Hosted by:

**North Dakota Bankers Association**  
PO Box 1438  
Bismarck ND 58502  
Phone: 701.223.5303  
[www.ndba.com](http://www.ndba.com)

Co-sponsored by:

**South Dakota Bankers Association**  
PO Box 1801  
Pierre SD 57501-1801



Registration Deadline • January 16, 2018

The full registration fee for bankers and business partners is \$525 which includes business sessions on Friday and Saturday, Friday breakfast and gala dinner, and Saturday breakfast, luncheon, and reception.

The spouse/guest registration fee is \$325 which includes Friday spouse/guest breakfast and program, Friday gala dinner, and Saturday closing speaker, luncheon, and reception.

Conference Fees:

Table with 2 columns: Registration Type and Fee. Includes Full Registration (\$525), Spouse/Guest Registration (\$325), Friday Gala Dinner Only (\$195), and Golf Tournament (\$255).

Please see separate form for golf registration.

Make checks payable to NDBA and mail to:

North Dakota Bankers Association
Attn: Registration
PO Box 1438
Bismarck ND 58502

Or email registration to ndba@ndba.com

Hotel Deadline • January 22, 2018

The Westin Kierland Resort & Spa

6902 E. Greenway Parkway, Scottsdale, AZ 85254
Phone: 800-354-5892 or 480-624-1000

Group Rate: \$309/night

Reservation Link: http://bit.ly/2h7lg5d

Cancellation Policy

Full refunds will be granted for cancellations received at the NDBA office on or before January 22. If notice of cancellation is received after January 22 and on or before February 5, an administrative fee of \$50 per canceled registration will be assessed but the remainder of the registration will be refunded. Due to financial commitments NDBA must make to the hotel, refunds will not be granted for cancellations after February 5. Substitutions are always permitted.

Tax Disclaimer

The estimated cost for all meals and breaks is \$445. This information is provided for your tax records, in keeping with the IRS 50% deductible provision under Section 274(n) of the Internal Revenue Code.

Questions? Please contact Dorothy Lick at the North Dakota Bankers Association at 701.223.5303.

Bank: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

1. Attendee Name: \_\_\_\_\_

Email: \_\_\_\_\_

Spouse/Guest Name (if registering): \_\_\_\_\_

Email: \_\_\_\_\_

- Full Registration
Friday Gala Dinner Only

- Spouse/Guest Registration
Friday Gala Dinner Only

2. Attendee Name: \_\_\_\_\_

Email: \_\_\_\_\_

Spouse/Guest Name (if registering): \_\_\_\_\_

Email: \_\_\_\_\_

- Full Registration
Friday Gala Dinner Only

- Spouse/Guest Registration
Friday Gala Dinner Only

- Please send an invoice
Check is enclosed
I'd like to pay by credit card. Please contact me.

PLEASE CONTINUE TO NEXT PAGE TO PRINT OR SUBMIT FORM.

TOTAL DUE: [ ]

Golf Registration Deadline • January 16, 2018

Friday, Feb. 16 – Kierland Golf Club

12:30 p.m. – Shotgun Start (Texas Scramble with handicap – 4-person teams). Team prizes and cash prizes for closest-to-the-pin and long drive.

If you have preferred partners, please list and enclose the fee for each player in your group or have each person show the same group on their registration form.

Registration form with fields for Name, Bank/Company, 18 Hole Handicap, and Phone for four players.

Each banker foursome will include an NDBA/SDBA business partner. You may arrange for a business partner to be on your team or NDBA will assign one.

Fee: \$255/person. Fee includes: green fees, cart, bag handling, tax and prizes.

Golf Rental: Golf clubs are available for rent at the Kierland Golf Club.

- Check to reserve a set of Ping clubs: Right-handed, Left-handed

Complete form and mail with payment to:

North Dakota Bankers Association, Attn: Registration, PO Box 1438, Bismarck ND 58502

- Please send an invoice, Check is enclosed, I'd like to pay by credit card. Please contact me.

TOTAL DUE: [ ]

Or Email to ndba@ndba.com