Allied with the prestigious SW Graduate School of Banking (SWGSB) at Southern Methodist University (SMU) and the Independent Bankers Association of Texas (IBAT), the Bank Operations Institute (BOI) in Dallas empowers you to achieve your highest potential as a key player at your financial institution. Custom learning in an executive center environment at the internationally renowned Cox School of Business ensures a leadership experience of the first rank.

The BOI program – taught by the industry’s top experts and consultants – is both comprehensive and goal-oriented, for the most efficiency and effectiveness, bar none. All classes are held at the Collins Executive Education Center, a state-of-the-industry conference facility designed by SMU Cox for the Fortune 500. “World Changers Shaped Here” is SMU’s universal motto, and you are part of this stimulating, transformational experience – all surrounded by one of the most beautiful campuses in America and home to the internationally acclaimed George W. Bush Presidential Center.

This unique approach to professional development is comprised of two annual six-day sessions: Level One and Level Two. Intensive and thoroughly engaging, each session is designed for the highest faculty-student interaction and team bonding. Tailored to bank operations, administration and compliance functions, the program takes you to the next level in your professional development and challenges you to see the big picture and the critical role you play in your bank’s ultimate success. You’ll come away inspired and fully prepared to enter the upper echelons of bank management – and rise to the challenges of an industry constantly changing in its complexity, standards and expectations.
WHO SHOULD ATTEND?

The program is well suited for those looking to enhance and continue to develop and perfect their managerial competencies around the operations of community banking. This includes operations and lending officers, cashiers and head tellers transitioning into management, branch managers, future chief financial officers, supervisory/management personnel as well as any future C-Suite talent wanting a better grasp of the overall operations of the bank.

PROGRAM DATES AND FEES

October 7-12, 2018

The $1,975 enrollment fee represents the best value in banking education today and compares favorably with other banking programs. It includes tuition and most meals for six days, course notebook and all handout materials. Meals include opening banquet on Sunday, lunches daily in the Umphrey Lee Cafeteria on SMU Campus, closing graduation, and informal dinners on two evenings, plus breaks throughout the week.

ACCOMMODATIONS

Magnolia Hotel
Dallas Park Cities
6070 North Central Expressway
Dallas, Texas 75206
214-750-6060
The Bank Operations Institute’s dynamic, interactive program is one of the finest in the nation. At BOI you are an active participant in the educational experience from day one. Here, there is an ongoing dialogue with instructors as you work through complex issues and approaches. In a series of team projects you also create a unique bond with your colleagues and peers, often learning key concepts that can only be acquired “hands on” from each other. It is a rich and thorough learning environment built for your success!

The BOI curriculum has been developed to maximize your return on your educational investment. This fast-paced, exciting program is a well-crafted blend of informative lectures, case studies, team building exercises and bank simulation. BOI’s advisory board, comprised of the top bankers, regulators and consultants in the country, are constantly guiding the program to ensure that it meets the challenges of today’s banking and regulatory environment – and exceeds your expectations.

BOI has a laser focus on improving your bank’s operation efficiency and compliance strategies. Today, more than ever before, your bank’s success depends on its ability to strategically control costs and deliver the highest quality products and services, all while remaining compliant with myriad regulatory requirements. This is a challenging task that BOI embraces with unrivaled vigor and imagination, perfectly reflected in the topics you will cover in two successive years:

**Level One**
- The Business of Banking
- Evaluating Bank Performance
- Risk Management
- Controlling Fraud
- Strategic Cost Control
- Effective Internal Control and Audit Procedures
- Current Compliance Topics
- Human Resources Management
- Project Management Processes
- Marketing and Cross Selling Measurement Tools
- Payment Trends and Digital Banking
- Effective Time Management

**Level Two**
- Managing for High Performance Banking
- Managing the Bank Investment Portfolio
- Strategic Planning
- Branch Transformation
- Delivery Systems and Channels
- Strategic Risk Management
- Effective Fraud Control
- Human Resources Strategies
- Maximizing Bank Performance
- Budgeting and Planning
- Bankruptcy and Other Legal Topics

**PRESENTED BY**

![SWGSB SW Graduate School of Banking Foundation](image1)
![IBAT Education Foundation](image2)
ADVISORY BOARD

ADVISORS
Randall James
Randall S. James
& Associates, Inc.

S. Scott MacDonald, Ph.D.
SWGSB Foundation

Brad Olson
Olson Research
Associates, Inc.

Jay Phillips
Cerfis Group, Inc.

REGULATORS
Troy Thornton
Office of the Comptroller
of the Currency

Charles Cooper
Texas Department
of Banking

Kristie Elmquist
FDIC

Robert L. Triplett, III
Federal Reserve
Bank of Dallas

BANKERS
Kevin Monk
Alliance Bank

Robert Hulsey
American National Bank
of Texas

Patrick Gray
TIB-The Independent
BankersBank, NA

Louis Ehlinger
Texas Heritage Bank

Perry Ritchie
BBVA
Compass Bank

SPONSORS

DIAMOND

The Baker Group

PLATINUM

TIB

Pulse

GOLD

CalTech

DELUXE

DELUXE Strategic Sourcing

SILVER

tech payments
Housing & Parking: Banking participants are responsible for arranging and paying for their own housing. A low group rate has been negotiated at the Magnolia Hotel Dallas Park Cities at 6070 North Central Expressway, Dallas, Texas 75206 (across from SMU).

Hotel Reservation Line: 888-915-1110. The room block is under “Bank Operations Institute.” BOI participants can also make hotel reservations online. Reservations must be made by the cut-off date of September 14, 2018. After this date, rooms are subject to availability at prevailing rates.

Cancellation Policy: Any cancellations made 5 business days prior to the program are subject to a $375 processing fee. You may substitute another person in your place at any time prior to the program date. Please inform the Registrar of the substitution. Course materials will be mailed to registrants who are unable to attend the program.

The IRS requires a notice on all registration forms, which informs the attendee of the amount of the registration fee representing food and beverage that is deductible as an ordinary business expense. We estimate the food cost portion of your basic registration fee is $900. Under current tax law 50% of this amount is deductible as an ordinary business expense. Please contact your accountant or tax advisor for further details.

For More Information Contact:
Julie Courtney, CAE, CMP
President
IBAT Education Foundation
1700 Rio Grande St., Ste. 100
Austin, TX 78701
Jcourtney@ibat.org

Individuals in need of special assistance with regard to this program are requested to contact the registrar at least 5 days before the meeting so that appropriate arrangements can be made.

Registration Fees: | Level One $1,975 | Level Two $1,975

MAIL IT IN: FAX IT IN: REGISTER ONLINE:
IBAT Education Foundation 512-322-9004 swgsb.org/operations
1700 Rio Grande St., Ste 100
Austin, TX 78701
“I’ve heard the saying, ‘you’ll always regret the things you didn’t try more than the things you do try.’ Absolutely no regrets here and I would encourage anyone who wants to challenge themselves, grow their network, identify and use new tools for career growth... to get involved with BOI.”

Brian Kolenda
Woodforest National Bank
Class President