



39th Annual
BANK OPERATIONS INSTITUTE
October 13-18, 2019

Allied with the prestigious SW Graduate School of Banking (SWGSB) at Southern Methodist University (SMU) in Dallas and the Independent Bankers Association of Texas (IBAT), the Bank Operations Institute (BOI) 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.

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.



REGISTRATION FORM

39th Annual Bank Operations Institute

October 13-18, 2019

Name	Title
Bank/Firm	Email
Address	Tel. No.
City/State/Zip	

Career Information

Total Years in Banking or Related Fields: _____ Bank Experience: _____

Current Job Responsibilities _____

Education Background _____

Recommending Officer's Information _____

Recommending Officer's Contact Information _____

Individuals in need of special assistance with regard to this program are requested to contact the registrar at least five 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 1700 Rio Grande St., Ste 100 Austin, TX 78701	512-322-9004 swgsb.org/operations	swgsb.org/operations

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 September 21, 2019. After this date, rooms are subject to availability at prevailing rates.

Cancellation Policy: Any cancellations made five 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 percent of this amount is deductible as an ordinary business expense. Please contact your accountant or tax advisor for further details.

Questions? Email ibateducation@ibat.org

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



WHO SHOULD ATTEND?

The program is well suited for those looking to continue developing and enhancing 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 13-18, 2019

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

BOI'S FIRST-CLASS LEARNING MISSION AND MASTERY

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. There is an ongoing dialogue with instructors as you work through complex issues and approaches. Through a series of team projects, you 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 a myriad of 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

Intro to Asset/Liability Management

Quarterly Report

Intro to UBPR

Internal Controls

Legal Aspects of Deposits

HR

Investment Portfolio Management

Level Two

Strategic Planning

Enterprise Risk Management

Marketing

Influencing Regulation

Legal Aspects of Operations

Vendor Management

Bank Simulations

Both classes will participate in sessions on project management, compliance, cybersecurity and lessons in leadership, as well as ALM simulation. Plus, students will participate in a shareholders meeting and a panel discussion with senior management from the four regulatory agencies.

PRESENTED BY



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SW Graduate School of
Banking Foundation



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Austin, TX 78701

I will highly recommend this course to anyone interested in making themselves and their bank better. This educational experience was an unforgettable experience and I am honored to have been a part of a great group of people.

Wayne E. Berger,
Controller, First National Bank, Giddings