

# 152<sup>nd</sup> Assemblies for Bank Directors

The Nation's Most Trusted Source For Bank Director Education



## The Board's Path to Peak Performance

You are cordially invited to join your banking peers from throughout North America for *The Board's Path to Peak Performance*. Presented by industry insiders and renowned strategists, this outstanding program will cover the "vital few" that will keep your financial institution on top — and prepared to meet the challenges that we community bankers already see ahead in the coming years.

On the agenda are topics bank boards are focusing on nationwide, from new bank management strategies to understanding "the numbers." Workshops will introduce you to experts who can give you solid plans for your own unique circumstances. The 152nd Assembly for Bank Directors will be held at the majestic **Park Hyatt Beaver Creek Resort & Spa**, an exclusive enclave just a few minutes from Vail. It was chosen for its convenient location, terrific value and proximity to popular Vail restaurants, shops, golf and other outdoor attractions.



**SWGSB**  
SW Graduate School of  
Banking Foundation

**PARK HYATT BEAVER CREEK RESORT**

— Vail Valley, Colorado • September 23- 26, 2021 —

# ASSEMBLIES FOR BANK DIRECTORS

## The Experience Of Success

For almost half a century, the Assemblies for Bank Directors has been the national leader in bank director education, serving more and more bank directors across America. The Assemblies' programs have kept U.S. bank boards abreast of the latest industry developments, as well as complemented senior management's own efforts to manage their institutions strategically. With regulatory authorities now requiring a full range of banking knowledge, you can rely on our experience to deliver programs of national interest — tailored to your unique duties and responsibilities. The Assemblies for Bank Directors draw bank directors and senior

management from throughout America to discuss the latest issues affecting the national banking industry. By monitoring the banking industry's "hot topics" we ensure that the bank director program content is always fresh and dynamic. The locations are calm and relaxing; the speakers, top-notch. The bank faculty and facilitators are drawn from the nation's leading banking experts. With an eye on new bank regulatory expectations and D&O insurance provisions, these national banking programs are designed to complement a financial institution's own efforts in assembling a board whose strategic vision and oversight is second to none.

### PARK HYATT BEAVER CREEK RESORT

— Vail Valley, Colorado • September 23- 26, 2021 —

#### Beaver Creek/Vail

Beaver Creek has the best family-friendly mountains around the Vail Valley. It is perfectly designed to welcome alpine enthusiasts of all ages and abilities. Beaver Creek is a unique and charming community situated on a mountainside, just south of Avon. It is one of the most luxurious alpine villages of Colorado. The village is world renowned for its Rocky Mountain majesty, in addition to a wide variety of restaurants, shops and outdoor adventures. Beaver Creek offers numerous fun things to do in the village such as an artistic playground of photo-friendly, oversize sculptures, which provide memorable experiences for one and all. It is home to some of the most popular hiking trails in the Vail Valley. These hiking trails feature waterfalls, rivers, streams and lakes. Most trailheads are located just a few minutes from the village. The chairlifts and gondolas on the grounds of the resort operate all summer, which makes it extremely easy for hikers to explore the mountain. Beaver Lake Trail and Turquoise Lakes Trail are some of the most visited trails in the area.

#### RESERVATIONS:

[www.hyatt.com/en-US/  
group-booking/BEAVE/G-ABD1](http://www.hyatt.com/en-US/group-booking/BEAVE/G-ABD1)  
(970) 949-1234

#### BOOK EARLY!

After August 23, 2021, rooms and group rates are subject to availability.

If you need additional assistance, please contact us at (970) 827-6610



# DIRECTORS PROGRAM

## THURSDAY, SEPTEMBER 23

- 4:30 p.m.-5:30 p.m.      Registration  
5:30 p.m.-6:30 p.m.      Reception (with Spouses)

## FRIDAY, SEPTEMBER 24

7:30 a.m.-3:30 p.m.

**Continental Breakfast** (with Spouses)

**Welcome and Program Announcements** (with Spouses) – S. Scott MacDonald, Ph.D.

- “*Risk Management in a Pandemic*” – David L. Kemp
- “*The ‘Real Role’ of the Audit Committee*” – Debbie Scanlon
- “*Optimizing the Investment Portfolio in a Low Rate Environment.*” – James J. “Jim” Clarke, Ph.D.

**Luncheon** (with Spouses) – **Sponsored by Commerce Street Capital**

- “*Diversity, Equity and Inclusion*” – Kelly McDonald

**Workshops** (please choose one):

- “*The Fundamentals of Asset/Liability Management*” – James J. “Jim” Clarke, Ph.D.
- “*Banking Capital Markets Update*” – Dory A. Wiley

*Evening at Your Leisure*

## SATURDAY, SEPTEMBER 25

7:30 a.m.-12:00 noon

**Continental Breakfast** (with Spouses)

**Announcements**

- “*What’s Up with This Economy?*” – Edmond J. “Ed” Seifried, Ph.D.
- “*Engaging Our Customers, Post Pandemic*” – Marci Armstrong, Ph.D.
- “*Strategic Planning: A Director’s Perspective*” – David L. Kemp

*Afternoon and Evening at Your Leisure*

## SUNDAY, SEPTEMBER 26

7:30 a.m.-9:30 a.m.

**Coffee Service Only** (with Spouses)

- Panel Discussion and Wrap-up – Armstrong, Clarke, Kemp, MacDonald, McDonald, Scanlon and Wiley

*Schedule Subject to Change. All events are business casual.*

# CCBD

THE CERTIFIED COMMUNITY  
BANK DIRECTOR'S PROGRAM

Remember that this and other Assembly programs satisfy part of the Certified Community Bank Directors™ (CCBD) requirements for certification (or recertification) offered by SWGSB Foundation and IBAT. Please visit [swgsb.org/cbd](http://swgsb.org/cbd) for more information about the CCBD certification requirements and how this program qualifies.

**The next CCBD program will be held on October 21-23, 2021.**

For more information about upcoming programs, visit [swgsb.org](http://swgsb.org).

# SPEAKERS

**Marci Armstrong, Ph.D.**, director, Brierly Institute, Edwin L. Cox School of Business, SMU

**James J. Clarke, Ph.D.**, principal, Clarke Consulting

**David L. Kemp**, president, Bankers Management, Inc. (BMI)

**S. Scott MacDonald, Ph.D.**, president and CEO, SWGSB Foundation

**Kelly McDonald**, president, McDonald Marketing

**Debbie Scanlon, CPA**, partner, BKD National Financial Services Group

**Edmond J. Seifried, Ph.D.**, co-chairman, Seifried & Brew, LLC

**Dory A. Wiley**, president and CEO, Commerce Street Holdings, LLC

“The programs I have been to are truly educational and are without the sales pitches so embedded in association meetings, seminars and conferences. It rejuvenates me as an officer and director to continue to 'poke the box!'”

**Bret Whiteside**, Senior Vice President,  
Traders and Farmers Bank, Haleyville, Alabama

## UPCOMING EVENTS

**Certified Community Bank Directors' Program 2021**  
Cox School of Business at Southern Methodist University  
Dallas, Texas  
October 21-23, 2021

**153rd Assembly for Bank Directors  
at the Hyatt Regency Maui Resort and Spa in Lahaina**  
Maui, Hawaii  
January 27-30, 2022

All programs are administered by the SWGSB Foundation, headquartered at the Edwin L. Cox School of Business, Southern Methodist University, Dallas, Texas.



# REGISTRATION

## PARK HYATT BEAVER CREEK RESORT

— Vail Valley, Colorado • September 23- 26, 2021 —

### Register early!

Program popularity may limit attendance. Call: (214) 768-2991 | email: abd@swgsb.org  
No prerequisites or advanced preparation is required.

NAME		NICKNAME		
BUSINESS OR PROFESSION				
TITLE				
MAILING ADDRESS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	HOME	BUSINESS	BANK	
CITY	STATE	ZIP CODE		
BUSINESS PHONE	CELL PHONE (for last-minute program updates)			
HOME PHONE				
E-MAIL ADDRESS				
BANK DIRECTORSHIP HELD IN	BANK ASSET SIZE			
BANK CITY	BANK STATE			
NAME OF SPOUSE OR GUEST, IF ATTENDING				

**Assembly Fees**  Director only, \$1,195  Spouse or guest, \$175

#### Group Discounts (from the same bank):

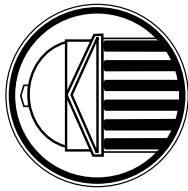
- \$1,095 each for 3rd & 4th directors  \$995 each for 5th & remaining directors  
 Enclosed is a check made payable to : SWGSB Foundation, P.O. Box 750214, Dallas, TX 75275-0214

**To register online and pay with your credit card, please visit our website at**  
[swgsb.org/form\\_event\\_directors?event=ABD152](https://www.swgsb.org/form_event_directors?event=ABD152)

**Assembly fees cover** educational materials, instruction, and scheduled events. Directors are responsible for their own travel expenses, hotel expenses, and travel arrangements. **For hotel reservations at our group rate**, please call **(970) 949-1234** and reference Assembly for Bank Directors.

**Online Reservations at:** <https://www.hyatt.com/en-US/group-booking/BEAVE/G-ABD1>  
For all other requests, please call the hotel concierge at (970) 949-1234.

**Cancellation policy:** All refunds are subject to a nonrefundable \$95.00 registration fee; cancellations must be in writing. Full refunds will be issued for cancellations made at least 10 days before the program's start date. A 50% refund will be issued for cancellations made between 10 days and 72 hours of the program's start date. No refunds will be issued for cancellations made 72 hours before the program's start date. For more information regarding administrative policies such as complaint and refund, please call David Davis at (214) 768-2991.



# SWGGSB

## SW Graduate School of Banking Foundation

Southern Methodist University  
PO Box 750214  
Dallas, TX 75275-0214

NonProfit Org,  
U.S. Postage  
**PAID**  
Southern Methodist  
University

“Banking continues to transform quickly with technological advances and the ability to deliver financial services in unprecedented new ways. These advances bring new board oversight responsibilities; and when you add a changing regulatory environment, the need for director training has never been greater. The Assemblies for Bank Directors provide your board members a first-class event and the opportunity to learn and network with the best.”

**Craig Buford, President and CEO**

Community Bankers Association of Oklahoma



SW Graduate School of Banking Foundation is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [NASBAregistry.org](http://NASBAregistry.org)

The program qualifies for up to 10 CPE credit hours.

All programs are considered specialized knowledge and conducted in group-live format.

SMU, SWGSB and IBAT do not discriminate on the basis of race, color, national or ethnic origin, sex, age, or disability.