Workshops for Bank Directors

What are the distinguishing characteristics of a successful board? What are their mission-critical duties and responsibilities? How can they best ensure a customer-oriented financial institution? What do you and your fellow directors need to do today to build the bank for the future? Do you have the technology that is reshaping the financial services marketplace? Is your institution measuring up to current performance trends? These and other important questions will be answered at the spring Workshop for Bank Directors and those that follow in the coming years.

“This is a critical time for financial institutions and the boards that oversee them. Only by pausing to take the time to evaluate the challenges and the strategies to meet those challenges can we truly build a firm foundation for future growth.”

– S. Scott MacDonald, Ph.D.

Led by the industry’s “best and brightest,” these programs take an in-depth look at what boards are doing today to guarantee a successful tomorrow. On the agenda is a complete outline of the characteristics of first-class directors — and what they can do individually and collectively to improve the bank’s performance. Ranked by attendees as one of the best educational values in the industry, the Workshops for Bank Directors take a comprehensive approach to vital topics — and this one will be especially relevant to outside as well as inside directors.

Held this upcoming spring – March 22-24, 2019 – the Workshop will be held at the recently renovated Hyatt Regency in Savannah, Georgia. The hotel was chosen for the exceptional value represented by its convenient location, top-notch service, and thoughtful amenities. It is an elegant, contemporary waterfront hotel with direct access to River Street and the Historic Districts. Guests are within walking distance of historic parks and squares, as well as year-round festivals and celebrations.

Questions?
Call: (214) 768-2991
E-mail: info@swgsb.org
Fax (214) 768-2992
Visit us online at: www.swgsb.org/directors

Upcoming Programs

148th Assembly for Bank Directors
"What’s Ahead for the Community Bank Director"
At the Grand Hyatt Baha Mar Nassau, The Bahamas
January 17-20, 2019

Certified Community Bank Director Program 2019
At the James M. Collins Executive Education Center
Southern Methodist University
Dallas, Texas
November 2019

SW Graduate School of Banking Foundation Annual Session
"Mastery Leadership and Taking Charge"
Edwin L. Cox
School of Business
Southern Methodist University
May 22 – June 6, 2019
Dallas, Texas

The Workshops for Bank Directors complement the Assemblies for Bank Directors and the Certified Community Bank Director (CCBD) certification. The Workshops allow directors to dig a little deeper into current “hot” issues. Since Workshop topics are constantly updated, directors can participate regularly. The Workshops meet the CCBD certification requirements for additional training or re-certification.

The Workshops for Bank Directors

MARCH 22-24, 2019
THE HYATT REGENCY SAVANNAH • SAVANNAH, GEORGIA

“The Hallmarks of an Effective Board”

Presented by

The Nation’s Most Trusted Source For Bank Director Education

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Events Schedule

Friday, March 22nd (5:30 p.m. - 7:30 p.m.)
Registration
Reception (with Registered Guests/Spouses)

Saturday, March 23rd (7:30 a.m. - 3:45 p.m.)
Continental Breakfast (with Registered Guests/Spouses)
Welcome and Program Announcements – S. Scott MacDonald, Ph.D.
“Creating Value: With or Without Sale” – Jeffrey C. Gerrish
“Strategic Credit Risk Management” – Merrill J. Reynolds
Luncheon (with Registered Guests/Spouses)
“How to Avoid or at Least Minimize Problem Loans” – Merrill J. Reynolds
“Cyber Security: Can It Be Obtained?” – Tim Leonard
Evening at your leisure

Sunday, March 24th (7:30 a.m. - 11:15 a.m.)
Continental Breakfast (with Registered Guests/Spouses)
“Performance Trends in Today’s Market: Are We Measuring Up?” – S. Scott MacDonald, Ph.D.
“Q&A: Panel Discussion” – Gerrish, MacDonald, Reynolds, and Leonard
Schedule subject to change without notice.

The Workshops for Bank Directors meet the 10-12 hour requirement for additional training or re-certification for the Certified Community Bank Director certificate. For more information on the CCBP program visit our website at www.swgsb.org/ccbd.

Scheduled Speakers

Jeffrey C. Gerrish is Chairman of the Board of Gerrish Smith Tuck Consultants, LLC and Gerrish Smith Tuck, PC. Attorneys. The two firms have assisted over 2,000 community banks in all 50 states across the nation. Mr. Gerrish’s consulting and legal practice places special emphasis on strategic planning for boards of directors and officers, community bank mergers and acquisitions, bank holding company formation and use, acquisition and ownership planning for boards of directors, regulatory matters.

Tim Leonard is the Chief Information Officer of Commercial Bank of Texas, in Nacogdoches. Tim has over 15 years of banking experience and has served in various management positions including information technology, bookkeeping, proof and transit, operations and call center. His passion for banking and education has given him the opportunity to speak at state and national conventions concerning IT infrastructure, management and information security.

Merrill J. Reynolds, Jr., is partner and co-founder of Reynolds Williams Group (RWG – Bankers Edge). Mr. Reynolds began his career as a bank examiner with the Federal Reserve Bank of Dallas. A forty-year banking veteran, he has worked for both community and multi-bank holding companies in various lending and managerial capacities. Mr. Reynolds founded Reynolds Williams Group in 1999, as a bank consulting firm designed to provide services to both commercial and savings financial institutions nationwide.

Workshops for Bank Directors

MARCH 22-24, 2019
THE HYATT REGENCY SAVANNAH • SAVANNAH, GEORGIA

Registration Form

Name
Name called by, for badge ______
Materials/billings should be sent to: ☐ Home: ☐ Business: ☐ Bank
Mailing address ______
City ______ State ______ Zip Code ______
Contact Phone ______ Home Phone ______
E-mail address ______ Business or profession ______
Bank directorship held in ______
Bank address ______
Bank city ______ Bank state ______ Bank zip code ______
Bank phone ______ Bank fax ______
Bank asset size ______
Bank president ______
Name of spouse or guest, if attending ______

6 Workshop fees:
___$895.00 each, first two (2) directors
___$795 each, 3rd and 4th director (Group discount)
___$695 each, 5th and additional directors (Full Board discount)
___$75.00 each, Spouse/Guest (attending reception & lunch)

Total Fees
Enclosed is a check made payable to: SWGSB Foundation
P. O. Box 750214
Dallas, Texas 75275-0214

Please mail registration form and check to:
SWGSB Foundation
P.O. Box 750214
Dallas, TX 75275-0214

The Workshop fees cover educational materials, instruction, and scheduled events. Directors are responsible for their own travel and hotel expenses, as well as all travel arrangements.

For hotel reservations, please call 888-421-1442 for Paxisky Customer Service and reference the “Workshop for Bank Directors”. The Workshop group rate is just $221.00, double or single occupancy, a significant savings over their spring rack rates. Other hotel taxes and fees may apply.

A dedicated website is available to book hotel rooms online: https://book.paxiskyy.com/149.61832

Cancellation Policy: All refunds are subject to a nonrefundable $95 registration fee and must be made in writing. Full refunds (less the 305 registration fee) will be issued for WRITTEN cancellations made at least 10 business days before the program’s start date. A 50% refund (less the 305 registration fee) will be issued for WRITTEN cancellations made between 10 business 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 complaints and refunds, please contact our offices at 214-768-2991.

Questions? Call (214) 768-2991.