



**SW Graduate
School of Banking
at SMU Cox**



*161st Assembly
for Bank Directors*

January 29–February 1, 2026
The Ritz-Carlton O'ahu, Turtle Bay
Oahu, Hawaii


The Nation's Most Trusted Source for Bank Director Education

The SW Graduate School of Banking at SMU Cox Assemblies for Bank Directors empower bank directors, aspiring bank directors, and those in a financial institution's C-suite with knowledge and relationships that strengthen careers, organizations, and communities.

Attendees gather from across the country to address the latest issues affecting the industry. From nationally known authorities on corporate governance to leading experts on risk management, the assemblies provide the knowledge to execute board duties with confidence and intelligence. With regulators now requiring a full range of banking knowledge, you can rely on our assemblies to deliver programs of national interest, tailored to the unique duties and responsibilities of community bank directors.

Directors who have attained the National Certified Community Bank Director's designation can be recertified by attending one SWGSB Assembly for Bank Directors every three years.

Register today!
**Learn more and
secure your spot at**
www.swgsb.org/turtlebay

 For CPE Credit—FIELD OF STUDY: Specialized Knowledge PREREQUISITES: A member of a bank's senior management team, a bank's board of directors, or an aspiring bank board director. PROGRAM LEVEL: Industry Update DELIVERY METHOD: Group/Live CPE CREDIT HOURS: Each in-person session qualifies for a maximum of 15 CPE credit hours. REGISTRY SPONSOR ID: #108414 SW Graduate School of Banking (SWGSB) is registered with the National Association of State Boards of Accountancy (NASBA) as a continuing professional education (CPE) sponsor on the National Registry of CPE Sponsors. Learn more at swgsb.org/programs. 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 at NASBAregistry.org. SMU/SWGSB do not discriminate based on race, color, national or ethnic origin, sex, sexual orientation, age, or disability. For information on policies, complaints, and refunds, call 214-768-2991.



Arnold Palmer Golf Course at Turtle Bay

Natural Beauty and Cultural Richness

Gain CPE credit hours learning from the nation's foremost banking experts while experiencing the amazing Oahu North Shore at this storied resort. The iconic **Arnold Palmer Golf Course at Turtle Bay Golf** is recognized by *Golf Digest*, the Champions Tour, and the LPGA Tour as one of the world's finest golf destinations. Enjoy a round with breathtaking oceanfront views, lush tropical scenery, and pristine greens at this top-tier facility.

The Ritz-Carlton offers something for everyone with its Nalu Spa, stables, fitness center, pickleball, tennis, and oceanside pools. Take a day trip to Honolulu to visit the **Pearl Harbor National Memorial**, see *Travel+Leisure's* 2025 top beach—Kahanamoku Beach at Waikiki—or hike Diamond Head for fantastic views.



USS Arizona Memorial

Program Highlights

Thursday, January 29, 2026

5–6:30 p.m. Registration and Welcome Reception (with spouses), Bay View Lawn

Friday, January 30, 2026

7:30–8 a.m. Breakfast (with spouses), Kahuku Foyer

8–8:15 a.m. Welcome and Program Announcements (with spouses), Kahuku Ballroom, *William T. Chittenden, Ph.D., President and CEO, SWGSB at SMU Cox*

8:15–9:15 a.m. Session 1: 10 Significant Issues Facing Directors of Banks, Kahuku Ballroom, *Jeffrey C. Gerrish, Senior Chairman, Gerrish Smith Tuck, Consultants and Attorneys*

9:15–9:30 a.m. Session 1 Q&A

9:45–10:45 a.m. Session 2: Gathering Deposits, Kahuku Ballroom, *Sean C. Payant, Ph.D., President, Haberfeld*

10:45–11 a.m. Session 2 Q&A

11:15 a.m.–12:45 p.m. Lunch and Keynote Address sponsored by Commerce Street Capital (with spouses), Kuilima 1

1–2 p.m. Session 3: Recent Stories from Loan Review, Kahuku Ballroom, *Steve Krase, Principal, Crowe*

2–2:15 p.m. Session 3 Q&A

2:30–3:45 p.m. Session 4: Bank Boards and Loan Decisions, Kahuku Ballroom, *Sandy Brown, Partner, Alston & Bird; Merrill J. Reynolds Jr., Managing Director of Executive Education, SWGSB at SMU Cox; Edmond J. Seifried, Ph.D., Chief Economist, SWGSB at SMU Cox*

Saturday, January 31, 2026

7:30–8 a.m. Breakfast (with spouses), Kahuku Foyer

8–9 a.m. Session 5: Attracting and Retaining Top Talent, Kahuku Ballroom, *Doug Van Dyke, Founder & CEO, Leadership Simplified*

9–9:15 a.m. Session 5 Q&A

9:30–10:30 a.m. Session 6: Advocacy – It's Not Just About the Capitol ... or Capital, Kahuku Ballroom, *Celeste Embrey, Executive Vice President & General Counsel, Texas Bankers Association*

10:30–10:45 a.m. Session 6 Q&A

11 a.m.–12 p.m. Session 7: A Bank Director's Guide to the Economy, Kahuku Ballroom, *Edmond J. Seifried, Ph.D., Chief Economist, SWGSB at SMU Cox*

Sunday, February 1, 2026

7:30–8 a.m. Breakfast (with spouses), Kahuku Foyer

8–9:30 a.m. Session 8: Economic Forecast, Kahuku Ballroom, *Edmond J. Seifried, Ph.D., Chief Economist, SWGSB at SMU Cox*

9:45–10:45 a.m. Session 9: Deep Dive into Your Institution and Peer Group, Kahuku Ballroom, *Jamie Sumner, Partner, Velligan-Blaxall Consultants*

10:45–11 a.m. Closing Comments and National Certified Community Bank Director Certificate Presentations, Kahuku Ballroom, *William T. Chittenden, Ph.D., President and CEO, SWGSB at SMU Cox; Merrill J. Reynolds Jr., Managing Director of Executive Education, SWGSB at SMU Cox*

Schedule subject to change. All events are business casual. Evenings are at your leisure.

WWW.SWGSB.ORG . INFO@SWGSB.ORG . 214.768.2991



SWGSB
at **SMU Cox**

161st ASSEMBLY FOR BANK DIRECTORS SPEAKERS



WILLIAM T. CHITTENDEN, PH.D.
PRESIDENT AND CEO, SWGSB



SANDY BROWN
Partner,
Alston & Bird



CELESTE EMBREY
Executive Vice President & General
Counsel, Texas Bankers Association



JEFFREY C. GERRISH
Senior Chairman,
Gerrish Smith Tuck
Consultants and Attorneys



STEVE KRASE
Principal,
Crowe



SEAN C. PAYANT, PH.D.
President,
Haberfeld



MERRILL J. REYNOLDS JR.
Managing Director of
Executive Education, SWGSB



EDMOND J. SEIFRIED, PH.D.
Chief Economist,
SWGSB at SMU Cox



JAMIE SUMNER
Partner,
Velligan-Blaxall Consultants



DOUG VAN DYKE
Founder & CEO,
Leadership Simplified



Kahanamoku Beach at Waikiki



A lookout point on Oahu



Oahu's Depot Beach Park

REGISTER EARLY

January 29–February 1, 2026
The Ritz-Carlton O'ahu, Turtle Bay

COST

\$1,995/attendee

\$395/guest attending social functions

Fees include program materials, reception, breakfast, keynote lunch, and refreshment breaks. Hotel accommodations and travel not included.

Group discounts are available for attendees from the same bank: \$1,745/each for third and additional directors. Program popularity will limit attendance.

To register, visit swgsb.org/turtlebay and use the REGISTER NOW link.

BOOK YOUR ROOM EARLY

The Ritz-Carlton O'ahu, Turtle Bay
57-091 Kamehameha Hwy, Kahuku, HI 96731 . 808.293.6000

A discounted group rate is available at the hotel. For the group rate, reference SWGSB Assembly for Bank Directors or visit swgsb.org/turtlebay and use the **RESERVE YOUR ROOM** link.

Cancellation Policy: Refunds are subject to a \$475 fee. Cancellations must be in writing. Refunds (less the \$475 fee) will be issued only for cancellations made at least 30 days prior to the program start date of January 29, 2026. No refunds will be issued for cancellations made after December 29, 2025. There are no transfers of funds to other SWGSB assemblies or programs. Attendee substitutions from the same bank may be made up to 30 days in advance.

For more information regarding payment and refund policies, please contact David Davis, SWGSB, Chief Operating Officer and Managing Director, at 214.768.2991 or ddavis@smu.edu.

UPCOMING PROGRAMS



APRIL 26–MAY 1, 2026
Commercial Lending School
with Texas Bankers Association
Dallas, Texas



MAY 26–JUNE 5, 2026
SW Graduate School of Banking
at SMU Cox
Dallas, Texas



SEPTEMBER 2–6, 2026
Assemblies for Bank Directors
Park Hyatt Beaver Creek Resort
Vail / Beaver Creek, Colorado

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“SWGSB Assemblies for Bank Directors are valuable for *aspiring bank directors* to help them gain the knowledge and expertise to lead with rigor and intelligence and *experienced directors* who want to hone their skills and learn from the experts about the latest topics of concern for banks.”

WILLIAM T. CHITTENDEN, PH.D.
PRESIDENT AND CEO, SWGSB



PO BOX 750214
DALLAS, TEXAS 75275

indicia

WWW.SWGSB.ORG · INFO@SWGSB.ORG · 214.768.2991