

The Nation's Most Trusted Source for Bank Director Education

**162nd Assembly
for Bank Directors**

SEPTEMBER 3–6, 2026
VAIL/BEAVER CREEK, COLORADO



SW Graduate
School of Banking
at SMU Cox

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Setting the Standard for Bank Governance

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.



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Gain CPE credit hours learning from the nation's foremost banking experts while experiencing the breathtaking Colorado Rockies. Park Hyatt Beaver Creek Resort and Spa offers an elevated alpine experience that goes far beyond a meeting venue—it becomes part of the transformation.

Executive education unfolds in an environment designed for both focus and renewal. This world-class resort surrounds every conversation with mountain grandeur and refined comfort. The award-winning Allegría Spa creates an atmosphere where clarity and calm come naturally. Walk mountain trails, enjoy exceptional on-site dining, or simply breathe in the crisp alpine air. The setting fosters meaningful dialogue, unhurried connection, and the kind of strategic thinking that only emerges when leaders step away from the everyday.



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.

Program Highlights

Thursday, September 3, 2026

5–6:30 p.m. **Registration and Welcome Reception** (with spouses), Crooked Hearth Terrace

Friday, September 4, 2026

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

8–8:15 a.m. **Welcome and Program Announcements** (with spouses), SH III-Jackson/SH II-Grouse, *William T. Chittenden, Ph.D., President and CEO, SWGSB at SMU Cox*

8:15–9:15 a.m. **Session 1: What Directors Need to Know**, SH III-Jackson/SH II-Grouse, *Josh McNulty, Partner, Hunton Andrews Kurth LLP*

9:15–9:30 a.m. **Session 1 Q&A**

9:45–10:45 a.m. **Session 2: Succession Planning**, SH III-Jackson/SH II-Grouse, *David Kemp, President, Bankers Management, Inc.*

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), SH I-McCoy's Peak

1–2 p.m. **Session 3: Community Bank Valuation**, SH III-Jackson/SH II-Grouse, *John Gosser, Managing Director, Commerce Street Capital*

2–2:15 p.m. **Session 3 Q&A**

2:30–3:30 p.m. **Session 4: Managing Expectations: What the Board Should Be Asking About Compliance**, SH III-Jackson/SH II-Grouse, *Leah Hamilton, Director Education Services & Compliance Advisor, Sentry Advisors*

3:30–3:45 p.m. **Session 4 Q&A**

Saturday, September 5, 2026

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

8–9 a.m. **Session 5: From Curious to Capable: An AI Playbook for Bank Directors, CEOs, and Senior Leaders**, SH III-Jackson/SH II-Grouse, *Doug Van Dyke, Founder and CEO, Leadership Simplified*

9–9:15 a.m. **Session 5 Q&A**

9:30–10:30 a.m. **Session 6: Understanding Tech Trends, Cybersecurity, Payments, and AI for Bank Success**, SH III-Jackson/SH II-Grouse, *Jimmy Sawyers, Chairman, Sawyers & Jacobs*

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**, SH III-Jackson/SH II-Grouse, *Edmond J. Seifried, Ph.D., Chief Economist, SWGSB at SMU Cox*

Sunday, September 6, 2026

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

8–9:30 a.m. **Session 8: Economic Forecast**, SH III-Jackson/SH II-Grouse, *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**, SH III-Jackson/SH II-Grouse, *Jamie Sumner, Partner, Velligan-Blaxall Consultants*

10:45–11 a.m. **Closing Comments and National Certified Community Bank Director Certificate Presentations**, SH III-Jackson/SH II-Grouse, *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.

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SWGSB
at **SMU Cox**

162nd ASSEMBLY FOR BANK DIRECTORS SPEAKERS



WILLIAM T. CHITTENDEN, PH.D.
PRESIDENT AND CEO, SWGSB AT SMU COX



JOHN GOSSER
Managing Director,
Commerce Street Capital



LEAH HAMILTON
Director Education Services &
Compliance Advisor, Sentry Advisors



DAVID KEMP
President,
Bankers Management, Inc.



JOSH MCNULTY
Partner,
Hunton Andrews Kurth LLP



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



JIMMY SAWYERS
Chairman,
Sawyers & Jacobs



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



JAMIE SUMNER
Partner,
Velligan-Blaxall Consultants



DOUG VAN DYKE
Founder and CEO,
Leadership Simplified



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SEPTEMBER 3–6, 2026

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\$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.

Learn more and register at www.swgsb.org/vail



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A discounted group rate is available at the hotel. For the group rate, reference SWGSB Assembly for Bank Directors or visit swgsb.org/vail and use the **RESERVE YOUR ROOM** link. **Cancellation Policy:** Refunds are subject to a \$495 fee. Cancellations must be in writing. Refunds (less the \$495 fee) will be issued only for cancellations made at least 30 days prior to the program start date of September 3, 2026. No refunds will be issued for cancellations made after August 3, 2026. 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 SWGSB Chief Operating Officer and Managing Director David Davis 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

OCTOBER 19–21, 2026

National Certified Community
Bank Director's Program at SMU Cox
Dallas, Texas

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Vail/Beaver Creek, Colorado



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“At SWGSB Assemblies, participants learn what distinguishes high-performing boards, what regulators and shareholders demand, and how to navigate pressing issues facing community banking today.”

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

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