SPRING TRAINING
GET YOUR TEAM IN TOP SHAPE

icba.org/education

MAY 2023
TRAINING GUIDE
» Inspire creativity and enthusiasm
» Register for 2023 seminars and certification institutes
» Satisfy BSA/AML training requirements with video training
Repurpose pledged funds for balance sheet flexibility.

Reduce collateralized deposits and increase asset liquidity.

By significantly reducing the collateral it holds for pledging purposes, your bank can avoid having pledging requirements drive its investment strategy. Reducing collateralization can give your bank more flexibility to manage interest rate risk. And, decreasing the need to track collateral on an ongoing basis can save time for both your bank and its customers.

Talk to us today about IntraFi’s solutions for collateral reduction.

Get in touch at (866) 776-6426
contactus@intrafi.com

IntraFi.com

Terms and conditions apply. A list identifying IntraFi Network insured depository institutions at which funds may be placed through IntraFi Network Deposits may be found at https://www.intrafi.com/network-banks.
INSPIRE CREATIVITY AND ENTHUSIASM
The ICBA LIVE theme this year was “Light the Fire. Light the Way.” As leaders, we need to inspire and motivate our teams to be successful. Inspiration doesn’t always come naturally, so we need to create strategies and environments that encourage creativity and enthusiasm. Here are some ways to do that:

» **Remove perceived limitations** and encourage experimentation, even if it results in some errors. Let your team know that it’s okay to fail.

» **Encourage your team to dream big** and start a dream book. This idea is inspired by the book *The Dream Manager* by Matthew Kelly, and it’s a powerful message to share with your team. This can help jump-start enthusiasm needed to begin or continue a task.

» **Focus on your employees’ strengths and talents** to create a strengths-based environment that increases creativity and productivity.

» **Don’t underestimate the value of team-building exercises** to bring colleagues together and foster camaraderie.

» **Make motivation a topic** and ask your team what motivates and inspires them personally to get a better understanding of what they value.

» **Allow for autonomy where possible and be clear in your communication** with your team so they know they are trusted and respected.

» **Show appreciation** for your team’s hard work and efforts.

But above all, remember that employees are individuals. What inspires or motivates one may not be as powerful for another. So, tailor your tactics to suit your team—and the individuals within it.

Be well,

Lindsay LaNore
Chief Learning & Experience Officer
Community Banker University

*For more thought leadership on the future of work, read Lindsay LaNore’s monthly column in Independent Banker magazine at independentbanker.org*
2023 LIVE EVENTS

Led by renowned industry experts, our certification institutes, seminars, and conferences address current bank regulations, operational procedures, marketplace trends, the latest technology, and more.

» Virtual and in-person delivery.
» Dates and locations are subject to change.
» Always refer to icba.org/seminars for the most current information.

* Virtual Institute Split Over Two Weeks.

» Register for both seminars and SAVE $100 with code MULTI_CR

**Call Report Seminar**
Discuss each call report schedule and review real-life challenges of completing a call report.

- May 10 Virtual
- CPE credits: 9
- ICBA member: $695

**Advanced Call Report Seminar**
Take a deep dive into complex areas of the call report.

- May 11 Virtual
- CPE credits: 9
- ICBA member: $695
Register for both seminars and SAVE $100 with code MULTI_CFSA

Financial Statement Analysis Seminar
Learn to assess the credit worthiness of a borrower by reviewing the role of accountants, the calculation of key ratios, and the use of financial statements in the credit decision process.

May 16
Virtual
CPE credits: 9
ICBA member: $495

Cash Flow Analysis Seminar
Study the mechanics of business cash flow statements and how to perform a complete credit analysis so that you can determine a business’ ability to repay with confidence.

May 17
Virtual
CPE credits: 9
ICBA member: $495

ICBA Audit Institute℠
Learn everything from defining the audit function, developing a risk model and audit plan, to designing and executing the audit program by examining the audit assets, liabilities, operations, and bank information systems.

May 16–18 and 23–25* Virtual
Sept. 17–22 Bloomington, MN
CPE credits: 49.5
ICBA member: $3,299

Bank Director Forums
Hear about the latest industry trends and gain market insights from renowned subject-matter experts. Sessions run from 8:30 a.m. to noon to accommodate busy schedules.

June 1
Virtual
Sep. 7
Virtual
Nov. 16
Virtual
CPE credits: 4.5 per session
ICBA member: $395
ICBA member and Bank Director Program subscriber: $295
ICBA Compliance Institute℠
Receive a detailed study of the relevant areas of regulatory compliance with a focus on real-life scenarios you will encounter in a compliance role.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Price</th>
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<tbody>
<tr>
<td>June 6–8 and 13–15*</td>
<td>Virtual</td>
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<td>44</td>
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<tr>
<td>Oct. 1–6</td>
<td>Bloomington, MN</td>
<td></td>
<td>CPE credits: 44</td>
<td>ICBA member: $2,899</td>
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Commercial Real Estate Lending Seminar
Review the new construction process, title work, appraisals, environmental reports, draw requests, and early warning signs of trouble in your project or borrower.

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<th>Event</th>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Price</th>
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<tbody>
<tr>
<td>June 14</td>
<td>Virtual</td>
<td></td>
<td>9</td>
<td>$395 before May 13</td>
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Analyzing Your Bank’s Financial Statement Seminar
Learn to assess strengths and weaknesses using your bank’s balance sheet and income statement. Survey today’s marketplace and apply what you’ve learned to build a CAMELS rating.

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<th>Event</th>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Price</th>
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<tbody>
<tr>
<td>June 15</td>
<td>Virtual</td>
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<td>9</td>
<td>$395 before May 13</td>
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ICBA Risk Management Institute℠
Discover strategies surrounding bank governance, credit risk, interest rate risk, liquidity risk, operational risk, compliance risk, and legal risk.

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<tr>
<th>Event</th>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Price</th>
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</thead>
<tbody>
<tr>
<td>June 26–28</td>
<td>St. Louis, MO</td>
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<td>22.5</td>
<td>$1,699</td>
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Vendor Management Seminar
Relationships with third-party vendors are commonplace and many provide a strategic advantage—however the rewards aren’t without risk. Learn what it takes to implement a sound vendor management program.

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<tr>
<th>Event</th>
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<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Price</th>
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<tr>
<td>Aug. 1–2</td>
<td>Virtual</td>
<td></td>
<td>12</td>
<td>$595 before July 7</td>
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</table>

Agricultural Credit Analysis Seminar
Review how agricultural lending works, its role in the community banking industry, and current lending challenges.

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<tr>
<th>Event</th>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Price</th>
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<tbody>
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<td>Aug. 2</td>
<td>Virtual</td>
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<td>9</td>
<td>$395 before March 17</td>
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</tbody>
</table>

Troubled Loans Seminar
Review liquidity versus solvency issues, management and industry strength, and the latest credit risks.

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<tr>
<th>Event</th>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Price</th>
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<td>Aug. 3</td>
<td>Virtual</td>
<td></td>
<td>9</td>
<td>$395 before July 7</td>
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ICBA BSA/AML Institute℠
Identify emerging areas of customer, product, and geographic risk, such as banking marijuana-related businesses and their potential effects on your bank’s BSA/AML program.

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<thead>
<tr>
<th>Event</th>
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<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug. 7–9</td>
<td>Bloomington, MN</td>
<td></td>
<td>20</td>
<td>$1,699</td>
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</table>
**CFO Forum**
Tackle the top issues facing CFOs today including tax and accounting strategies, deposit funding sources, risk management, cybersecurity, and more.

Aug. 14–15  Kansas City, MO
CPE credits: 13.5
ICBA member: $695 before July 14

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**Community Bank Human Resources Seminar**
Discover critical HR requirements all community bank HR professionals must know and discuss emerging legal issues affecting community banks.

Aug. 16–18  Kansas City, MO
CPE credits: 19
ICBA member: $695 before July 14

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**ICBA Credit Analyst Institute℠**
Examine the evolving role of the credit analyst and critical functions such as financial analysis, overall business risk, legal liability, and customer relationship needs.

Aug. 15–17  Virtual
Oct. 1–4  Bloomington, MN
CPE credits: 27.5
ICBA member: $1,699

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**ICBA Commercial Lending Institute℠**
Learn to efficiently identify and analyze opportunities, assess, and mitigate risks, and structure and manage commercial loans.

Aug. 20–25  St. Louis, MO
CPE credits: 47
ICBA member: $2,299

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**Advanced IT Seminar**
Evaluate emerging technologies, optimize processes, and learn how to meaningfully measure your bank’s IT operations.

Aug. 22–24  Virtual
CPE credits: 16
ICBA member: $595 before July 25

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**ICBA Bank Security Institute℠**
Ground yourself in the bank security basics and learn about situations you may not be prepared for.

Aug. 28–30  Bloomington, MN
CPE credits: 21
ICBA member: $1,699

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**ICBA Consumer Lending Institute℠**
Review all aspects of the application process, financial statement analysis, credit analysis, loan structure, compliance, documentation procedures, and closing.

Sept. 10–13  Bloomington, MN
CPE credits: 25.5
ICBA member: $1,699

---

**Community Bank Marketing Seminar**
Over three days packed with critical marketing information engage with other community bank marketers and learn how to propel your marketing efforts to the next level.

Sept. 20–22  Nashville, TN
CPE credits: 21
ICBA member: $695 before Aug. 23
Annual Current Issues Certification Conference
This four-day conference focuses on key issues and trends related to auditing, BSA/AML, regulatory compliance, security and fraud, and offers the very latest information, tools, best practices, and training to assure that you are up-to-date and compliant. Attend one day or all four!

» Day One—Audit Issues
» Day Two—Lending & Deposit Compliance Issues
» Day Three—BSA/AML Issues
» Day Four—Fraud & Physical Security Issues

| Sept. 25–28 | Virtual |
| Oct. 23–26 | San Antonio, TX |

CPE credits: 8 per day
ICBA member: $1,345 (4 days) $995 (3 days) $695 (2 days) $395 (1 day)

IT General Controls Seminar
Learn best practices to monitor your bank’s internal controls and ensure adequacy and compliance with bank policies and procedures.

| Oct. 11–12 | Virtual |

CPE credits: 12
ICBA member: $495 before Sept. 13

ICBA IT Institute℠*
Learn how information technology solutions are evolving and allowing community banks to increase efficiency, improve service capabilities, and better safeguard customers.

| Oct. 15–19 | Bloomington, MN |

CPE credits: 38
ICBA member: $2,699

Annual Directors Conference
Designed for community bank directors, learn about today’s most pressing corporate governance issues.

| Oct. 11–13 | Carlsbad, CA |

CPE credits: 13.5
ICBA member: $1,095
ICBA member/Bank Director Program pricing: $895
Trending Topics on Tap

UNLIMITED WEBINAR PASS

HERE’S A TASTE OF WHAT’S COMING UP:

» Quarterly Regulatory Compliance
» Regulation E
» BSA Hot Topics
» IRA and HSA Fundamentals
» The Active Shooter
» Community Bank Expense Practices

» Strategic Planning for Your Community Bank
» Internal Fraud
» Treasury Management
» Improving Your Credit Committee Presentations

SUBSCRIBE TODAY FOR:

» 12 months of in-depth learning on topics from BSA to climate risk.
» Real time and on demand viewing options.
» The ability to download and archive webinar recordings to create your own learning library.
» And, more!

We’re passionate about providing you with the tools and knowledge to succeed. That’s why we host 100+ webinars each year on the hottest topics in the industry, from regulatory compliance to corporate governance.

Our subscribers rave about the quality of our webinars, saying that they’re “very informative” and “easy to listen to and understand.”

*Don’t miss out on this opportunity to stay ahead of the game in the world of community banking. icba.org/unlimitedwebinars*
ONLINE TRAINING BUNDLES

HSA/IRA ONLINE TRAINING BUNDLE
The HSA/IRA Online Training Bundle is essential for frontline and operations personnel who open and manage HSA/IRA deposit accounts.

The 15 courses in this bundle cover essential information related to HSA/IRA accounts, legal issues that can arise, HSA/IRA reporting requirements, and more.

- Training is online and self-paced.
- There is no limit to the number of bank employees that can be enrolled.
- Subscriptions are $249 and run 12 months from date of purchase.

LOOKING FOR MORE FOCUSED LEARNING?
Check out our other online training bundles.

<table>
<thead>
<tr>
<th>Bank Compliance Bundle</th>
<th>This 55-course bundle covers key topics such as Federal Regulatory Compliance (A to Z regulations, FCRA, Fair Lending, and more), Bank and Information Security, and the Bank Secrecy Act.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workplace Compliance Bundle</td>
<td>This bundle includes 50 courses that cover information that is critical to maintain a secure and compliant place of business. Courses focus on human resources, bank and information security, fraud, and more.</td>
</tr>
</tbody>
</table>

Visit icba.org/education/online-training-center to learn more.
## ONLINE TRAINING PLANS

<table>
<thead>
<tr>
<th>minimum subscription ▶</th>
<th>STANDARD</th>
<th>CUSTOM</th>
<th>PREMIUM</th>
<th>CLOUD DELIVERY</th>
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<td></td>
<td>1 year</td>
<td>1 year</td>
<td>3 years</td>
<td>1 year</td>
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**Access to more than 425+ courses**
- covering Compliance, Security, Management, Information Technology, Customer Service and Sales, Teller Training, Human Resources, Audit, HSA/IRA, and Personal Development

**Email alerts for enrollment reminders**—options vary by plan type

**Enroll employees in courses by job function**—options vary by plan type

**Access to usage and enrollment reports**

**Upload your bank’s policies and procedures** into 60+ pre-selected courses

**Track in-house classroom and outside training**

**Import your own custom courses**

**Store and use custom human resources data**, such as job title or hire date, for reporting and automated course assignment

**Export training course completions** for import into human resource system

| DOES YOUR BANK HAVE A LEARNING MANAGEMENT SYSTEM (LMS)? | If yes, choose our Cloud Delivery Plan. Access 425+ courses and upload your bank’s policies and procedures directly from your learning management system through our seamless cloud integration. |

| YEARLY PRICE FOR ICBA MEMBERS | $649 | $1,299 | $6,499/yr + one-time $2,500 setup fee | $2,499/yr + one-time $2,500 setup fee |
| YEARLY PRICE FOR NON-MEMBERS | $1,999 | $2,999 | $9,999/yr + one-time $2,500 setup fee | $3,999/yr + one-time $2,500 setup fee |
Our certificate programs help enhance professional skills, offer practical training, make it easy to explore career growth, and add more value to your organization. Certificate programs are 100% online, allow for flexible, self-paced learning at an affordable price, and don’t require ongoing CPE. Bank-wide subscriptions renew at a discounted price.

<table>
<thead>
<tr>
<th>Course Topics</th>
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<th>ICBA Member Enrollment</th>
<th>Nonmember Enrollment</th>
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<td><strong>Auditing</strong></td>
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<tr>
<td>» Introduction to Auditing</td>
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<tr>
<td>» Auditing Assets and Liabilities</td>
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<td>» Compliance Auditing</td>
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<td>» Specialty Auditing and IT</td>
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<tr>
<td>» Communicating the Results</td>
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<td><strong>Compliance</strong></td>
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<tr>
<td>» Lending Regulation</td>
<td>17</td>
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<td>» Bank Secrecy Act</td>
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<td>» Deposit Regulation</td>
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<tr>
<td>» Other Federal Regulations</td>
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<td><strong>Human Resources Generalist</strong> (Federal or California Specific)</td>
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<tr>
<td>» HR Law</td>
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<td>» Leaves of Absence</td>
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<td>» Performance Management</td>
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<tr>
<td>» Employee Coaching</td>
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<td><strong>Principles of Banking</strong></td>
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<tr>
<td>» Banking Landscape and Structure</td>
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<tr>
<td>» Banking Finance</td>
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<td>» Products and Services</td>
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<tr>
<td>» Capital Adequacy, Asset Quality, Management Earnings, Liquidity, and Sensitivity (CAMELS)</td>
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<tr>
<td>» Teller Basics</td>
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<tr>
<td>» Customer Service</td>
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<td>» Checks</td>
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<td>» Compliance</td>
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<td><strong>Teller Specialist</strong></td>
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<tr>
<td>» New Deposit and Loan Requirements</td>
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<td>» Customer Relationship-Building</td>
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<td>» Cross-Selling</td>
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<td>» Checks</td>
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<td>» Compliance</td>
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<td><strong>Universal Banker</strong></td>
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<tr>
<td>» New Deposit and Loan Requirements</td>
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<tr>
<td>» Customer Relationship-Building</td>
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<tr>
<td>» Cross-Selling</td>
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<tr>
<td>» Checks</td>
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<td>» Compliance</td>
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RESOURCES AND TOOLS

Community Banker University offers a variety of tools to support your bank.

Keep Your Critical Functions On Track

With digital Audit and Compliance Working Papers, your bank can create an easy-to-follow, cross departmental process to ensure compliance and mitigate institutional risk. Effortlessly add notes about best practices, procedures, or even items that were identified during reviews.

AUDIT WORKING PAPERS

Includes in depth operations testing of the underwriting process for loan review, plus new working paper topics on trust, loan servicing, and health savings accounts. All working paper topics include:

» Worksheets
» Internal control questionnaires
» Memos, testing, and review checklists

ICBA member: $599
Renews after one year at $399

SAVE $200 when you purchase the Audit and Compliance Working Papers together. To receive the discount, call 800-422-7285 to place your order.

COMPLIANCE WORKING PAPERS

These compliance working papers are essential for monitoring your bank’s compliance with federal consumer compliance laws and regulations. Each regulatory topic comes with:

» A summary of the regulations
» Action plans
» Checklists

ICBA member: $599
Renews after one year at $399
Check Your Ad

A new resource from Community Banker University.

ALWAYS KNOW YOUR ADVERTISING IS ACCURATE, TRANSPARENT, AND COMPLETE IN ITS MESSAGING

The advertising requirements of Regulation Z and Regulation DD are convoluted. To ensure that an advertisement complies requires checking and rechecking the regulations.

Check Your Ad takes the guesswork out of determining the appropriate requirements for deposit and lending advertisements allowing your marketing team or other bank personnel to check an ad without assistance from the compliance officer.

Simply choose the type of advertisement—Closed End Lending, Open End Lending, or Deposit—and Check Your Ad walks you through a step-by-step review of each appropriate requirement. Once complete you can generate a report and you’ll know whether the advertisement is in compliance or needs revisions. Saved reports can be used as proof of compliance.

Must call ICBA’s Community Banker University to order and receive the discount.
800-422-7285

Subscribe to Check Your Ad, Compliance Deskbook and Bulletin Service, and Bank Compliance Check Up and save $300
Purchase two of these products and save $100
New subscriptions only. Offer valid for first year of subscription only.
BSA/AML Videos
Stay compliant and satisfy annual BSA/AML training requirements.

Our popular BSA/AML Video Training Series is newly updated with live action, fresh content, best practices, and the latest hot topics. These videos are everything your team needs to stay compliant with BSA/AML annual training requirements.

**PURCHASE ONLY THE VIDEO TRAINING MODULE(S) YOU NEED OR THE ENTIRE FIVE-PART SERIES**
The BSA/AML Video Training Series allows you to offer training that is specific to employees in the following job categories:

1. BSA officer and staff
2. Frontline and operations staff
3. Lenders and lending staff
4. Senior management and the board of directors
5. General staff

* Banks that belong to ICBA’s Bank Director Program receive discounted pricing.
The Bank Director Program provides exclusive director-related training, tailored to meet the needs of your board and delivered through bi-monthly newsletters, online training, a governance helpline and preferred pricing on resources and events.

YOUR BANK’S ENTIRE BOARD OF DIRECTORS HAS FULL ACCESS TO:

» Attorney-staffed Governance Helpline for on-the-spot advice
» Employment guidance with the ICBA Employment Law Hotline
» 20 online compliance, risk, and governance training courses for directors
» Expert insights delivered through the bimonthly Bank Director News
» Bank Director Video Series
» Compliance Acronym Quick Reference Guide
» Plus, discounts on resources and events such as the Annual Directors Conference (see back page for details).

To learn more, contact Cindy Salzl, Bank Director and Webinar Specialist, at cindy.salzl@icba.org or 800-422-7285 ext. 7336.

icba.org/bdp
Bank Director Program
Online Courses

The ICBA Bank Director Program offers your bank a comprehensive online training platform designed to equip your board of directors with the knowledge and tools to maximize their contribution to the bank.

With exclusive access to 20 courses, directors can learn at their own pace from the convenience of their home or office, and on any device, including desktops, tablets, and mobile devices.

ONLINE COURSES INCLUDE:
» Bank Secrecy Act—Sr. Management and Directors  
» Board Committees  
» Board Governance  
» CAMELS  
» Compliance Laws and Regulations  
» Compliance Program Management for Directors  
» Cyber and Information Security Overview for Sr. Management  
» Director Responsibilities Concerning Lending  
» Ethics for Bank Directors  
» Executive Compensation Practices for Bank Directors

Visit icba.org/bdp to see the complete online course listing.
COMMUNITY BANKER UNIVERSITY TEAM

Contact us at communitybankeruniversity@icba.org or 800-422-7285.

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Senior Vice President, Certification, Seminars, Webinars, and Bank Director Program
shirley.ringhand@icba.org

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