SEPTMBER 2023
TRAINING GUIDE

» Certifications:
  A Leadership Launch Pad
» Your Regulatory Compliance HQ
» NEW! Credit Bootcamp
  Webinar Series

ACTIVATE YOUR LEADERS

icba.org/education
Stable, Cost-Effective Balance Sheet Essentials: Reciprocal Deposits

GROW CORE DEPOSITS & FRANCHISE VALUE TODAY

Most reciprocal deposits are reportable as nonbrokered and can help strengthen your bank’s balance sheet. With IntraFi’s ICS® and CDARS® services, your bank can build loyal, local customer relationships and receive deposits that typically come in large-dollar increments. The inventor and largest provider of reciprocal deposit services, IntraFi provides high per-depositor and per-bank capacity, thanks to The Power of Many®—its unparalleled network of thousands of financial institutions. Discover how your bank, no matter its size, can benefit from reciprocal deposits in today’s competitive marketplace.

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

www.intrafi.com

Use of CDARS or ICS is subject to the terms, conditions, and disclosures in the applicable program agreements, including the IntraFi Participating Institution Agreement. A list identifying IntraFi network banks may be found at https://www.intrafi.com/network-banks. The depositor may exclude banks from eligibility to receive its funds. IntraFi, ICS, and CDARS are registered service marks, and the IntraFi logo is a service mark, of IntraFi Network LLC.
ACTIVATE YOUR BANK’S FUTURE LEADERS
Cultivating future leaders is essential for your bank’s sustained success and growth. By fostering a culture of continuous learning, you can build a pipeline of capable and confident leaders who are ready to tackle challenges and seize opportunities.

**Focus on soft skills:** Effective professional development training goes beyond technical expertise. Emphasize crucial soft skills like communication, decision-making, and adaptability. These competencies are vital for leaders to navigate the dynamic and ever-evolving financial sector. Check out the Personal Development courses in our Online Course catalog.

**Provide networking opportunities:** Seminars and conferences offer a forum for networking and collaboration. Encourage future leaders to interact with their peers, exchange ideas, and gain valuable insights into industry trends. These interactions enable up and coming bankers to broaden their perspectives. The upcoming LEAD FWD Summit (Sept. 18–19, Kansas City, Mo.) and Annual Directors Conference (Oct. 11–13, Carlsbad, Calif.) are great places for future leaders to connect!

**Invest in employee growth:** Professional development training instills a sense of loyalty and commitment among employees. When you invest in their growth and career progression, it reinforces that their contributions are valued and appreciated. This leads to increased engagement and reduced turnover, creating a stable and motivated workforce. Watch for new updates to ICBA’s Leadership Academy coming soon!

By providing the right tools, skills, and opportunities to nurture talent, community banks can cultivate their future leaders and secure a competitive edge in the ever-evolving banking landscape.

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

**TABLE OF CONTENTS**

- CERTIFICATIONS 4
- REGULATORY COMPLIANCE 5
- HEADQUARTERS 6
- 2023 LIVE EVENTS 8
- ONLINE TRAINING BUNDLES 11
- ONLINE TRAINING PLANS 12
- ONLINE CERTIFICATES 13
- BANK DIRECTOR PROGRAM 14
- UNLIMITED WEBINAR PASS 16
- NEW! CREDIT BOOTCAMP WEBINAR SERIES 17
- COMMUNITY BANKER UNIVERSITY TEAM 18
CERTIFICATIONS

Managing a career in community banking requires staying current on industry trends and maintaining a commitment to ongoing education and professional development. A certification from ICBA helps ensure that community bankers are well equipped to handle complex financial scenarios.

RECEIVE THE RECOGNITION YOU DESERVE

You worked hard to earn your credentials. Community Banker University awards digital badges to community bankers who have successfully completed any of our nine certification programs.

Digital badges are essentially a digital representation of certification credentials. The badges contain metadata that describe your qualifications and credentials, including how you earned them. Display the badge in your email signature, electronic copies of your resume, and on social media sites. These digital credentials cannot be falsified and will protect the integrity of your accomplishment.

NINE CERTIFICATION PROGRAMS IN THE FOLLOWING AREAS:

» Audit  » Compliance  » Credit Analysis
» BSA/AML  » Consumer Lending  » IT
» Bank Security  » Commercial Lending  » Risk

STEPS TO CERTIFICATION

1. Attend an ICBA institute in its entirety.
2. Participate in all assigned case studies, group work, and presentations.
3. Successfully pass all exams given during the institute.

Visit icba.org/certification to learn more about ICBA’s certifications.
A Leadership Launch Pad
Community bankers at every career stage gain an advantage with an ICBA certification.

MEET TRICIA STRAIN
Tricia Strain is the compliance officer and internal auditor for First National Bank in Bagley, Minn., but for 20 years prior she worked in the hospitality industry managing resorts and hotels. Tired of the nights, weekends, and holidays-grind, Tricia returned to her hometown of Bagley (population 1,200) where she was hired as a bank teller by First National Bank.

After only 10 months, she was approached by the bank’s COO and asked if she was interested in training to become an internal auditor as First National Bank’s current internal auditor was retiring in a few years. After a year of training, the bank’s compliance officer retired, and the internal auditor took over that position and so she began training for compliance as well.

Today Tricia works as the bank’s compliance officer and internal auditor and has earned and maintains three ICBA certifications. She is an ICBA Certified Community Bank Compliance Officer (CCBCO), an ICBA Certified Community Bank Internal Auditor (CCBIA), and an ICBA Certified BSA/AML Professional (CBAP).

In Tricia’s words:

“Get certified through ICBA and go to the Annual Current Issues Certification Conference. Interact with the other attendees. Not only do you meet new friends, but they can also be a resource when you have a problem you can’t solve or need help with regulation changes. I keep up all three certifications because each one helps me be better at the other.”
Take command of your bank’s compliance with training and tools for every need and learning style.

ICBA COMPLIANCE INSTITUTE℠
At the ICBA Compliance Institute, we go beyond surface-level understanding. We approach each regulation with meticulous detail, focusing on its requirements, best practice internal controls, and monitoring objectives. We believe in hands-on learning, and that’s why we provide learners with best practices, applicability charts, and engaging quizzes and exercises that reinforce knowledge. After successfully completing the requirements of the institute, bankers can test to achieve the Certified Community Bank Compliance Officer (CCBCO) designation. ICBA's Compliance Institute is offered three times a year.

Register for the last 2023 Compliance Institute, Oct. 1–6 in Bloomington, Minn.
The first Compliance Institute of 2024 is Feb. 25–March 1, 2024 in Dallas, Texas. Registration will be opening soon.
ICBA Member: $2,899, Certification Testing Fee: $500

ICBA COMPLIANCE VAULT
Did you know that as an ICBA member your bank has access to a free, reliable search tool to help you find answers to your most pressing compliance questions? ICBA's Compliance Vault contains 2,600+ Q&A's, select eLearning courses, and more.
ICBA Member: FREE
COMPLIANCE CERTIFICATE PROGRAM
Prevent compliance skill gaps and get employees in fighting shape with the Compliance Certificate Program. Self-paced and 100% online, learners work through the following four key areas of bank regulatory compliance: Lending, Deposits, Operations, and the Bank Secrecy Act. Bankers are awarded a Certificate of Completion documenting their achievement. Unlike certification programs, certificates do not require ongoing Continuing Professional Education (CPE) credit.
ICBA Member: $499

COMPLIANCE WORKING PAPERS
Use our Compliance Working Papers to stay on track and document your bank’s implementation of compliance policies, procedures, controls, and corrective actions, if taken. Compliance working papers are offered digitally and include:
  » A summary of the regulation
  » Action plans
  » Checklists
ICBA Member: $599

CHECK YOUR AD
Take the guesswork out of advertisement compliance and know that your marketing is accurate, transparent, and complete in its messaging. Check Your Ad provides a step-by-step review of each appropriate requirement for three types of ads: Closed End Lending, Open End Lending, or Deposit, and generates an easy-to-understand report that documents whether your ad complies or needs revisions.
ICBA Member: $599

COMPLIANCE DESKBOOK
The ICBA Compliance Deskbook is the industry’s premier resource for compliance information. The one-year subscription includes searchable regulations with detailed descriptions, issues and guidance from regulators, and a calendar with important dates.
ICBA Member: $499

BANK COMPLIANCE CHECK UP
The Bank Compliance Check Up Program provides a comprehensive system and checklists for monitoring and determining the bank’s compliance with deposit, lending, administrative regulations, and other banking laws. Includes over 40 training agendas and quizzes.
ICBA Member: $499
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.

**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: $695

**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
**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.

- Sept. 7 Virtual
- Nov. 16 Virtual

CPE credits: 4.5 per session
ICBA member: $395
ICBA member and Bank Director Program subscriber: $295

**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.

- Sept. 17–22 Bloomington, MN

CPE credits: 49.5
ICBA member: $3,299

**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 and Deposit Compliance Issues
- **Day Three**—BSA/AML Issues
- **Day Four**—Fraud and Physical Security Issues

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member Pricing</th>
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</thead>
<tbody>
<tr>
<td>Sept. 25–28</td>
<td>Virtual</td>
<td>8 per day</td>
<td>$1,345 (4 days), $995 (3 days), $695 (2 days), $395 (1 day)</td>
</tr>
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</table>

### ICBA Credit Analyst Institute<br>S<sup>SM</sup>

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member: $1,699</th>
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</thead>
<tbody>
<tr>
<td>Oct. 1–4</td>
<td>Bloomington, MN</td>
<td>27.5</td>
<td>$1,699</td>
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</table>

### ICBA Compliance Institute<br>S<sup>SM</sup>

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>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member: $2,899</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct. 1–6</td>
<td>Bloomington, MN</td>
<td>44</td>
<td>$2,899</td>
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</tbody>
</table>

### Auditing IT General Controls Seminar

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member: $495 before Sept. 13</th>
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</thead>
<tbody>
<tr>
<td>Oct. 11–12</td>
<td>Virtual</td>
<td>12</td>
<td>$495 before Sept. 13</td>
</tr>
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</table>

### Annual Directors Conference

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member: $1,095</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct. 11–13</td>
<td>Carlsbad, CA</td>
<td>13.5</td>
<td>$1,095</td>
</tr>
</tbody>
</table>

### ICBA IT Institute<br>S<sup>SM*</sup>

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member: $2,699</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct. 15–19</td>
<td>Bloomington, MN</td>
<td>38</td>
<td>$2,699</td>
</tr>
</tbody>
</table>

### ICBA BSA/AML Institute<br>S<sup>SM</sup>

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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>CPE Credits</th>
<th>ICBA Member: $1,699</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov. 7–9</td>
<td>Virtual</td>
<td>20</td>
<td>$1,699</td>
</tr>
</tbody>
</table>
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></th>
<th>STANDARD</th>
<th>CUSTOM</th>
<th>PREMIUM</th>
<th>CLOUD DELIVERY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>minimum subscription</strong></td>
<td>1 year</td>
<td>1 year</td>
<td>3 years</td>
<td>1 year</td>
</tr>
<tr>
<td><strong>Access to more than 425+ courses</strong> covering Compliance, Security, Management, Information Technology, Customer Service and Sales, Teller Training, Human Resources, Audit, HSA/IRA, and Personal Development</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Email alerts for enrollment reminders</strong>—options vary by plan type</td>
<td>✓</td>
<td>✓</td>
<td>Customizable</td>
<td></td>
</tr>
<tr>
<td><strong>Enroll employees in courses by job function</strong>—options vary by plan type</td>
<td>✓</td>
<td>✓</td>
<td>Customizable</td>
<td></td>
</tr>
<tr>
<td><strong>Access to usage and enrollment reports</strong></td>
<td>✓</td>
<td>✓</td>
<td>Customizable</td>
<td></td>
</tr>
<tr>
<td><strong>Upload your bank’s policies and procedures into 60+ pre-selected courses</strong></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
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<tr>
<td><strong>Track in-house classroom and outside training</strong></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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</tr>
<tr>
<td><strong>Import your own custom courses</strong></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Store and use custom human resources data, such as job title or hire date, for reporting and automated course assignment</strong></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Export training course completions</strong> for import into human resource system</td>
<td>✓</td>
<td>✓</td>
<td>Customizable</td>
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</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th></th>
<th>ICBA MEMBERS</th>
<th>NON-MEMBERS</th>
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<tbody>
<tr>
<td><strong>YEARLY PRICE FOR</strong></td>
<td>$649–$812</td>
<td>$1,999–$2,499</td>
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<tr>
<td><strong>PRICE FOR</strong></td>
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<td><strong>ICBA MEMBERS</strong></td>
<td>$1,299–$1,624</td>
<td>$2,999–$3,749</td>
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<tr>
<td><strong>NON-MEMBERS</strong></td>
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<tr>
<td><strong>$6,499/yr + one-time $2,500 setup fee</strong></td>
<td>$9,999/yr + one-time $2,500 setup fee</td>
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<tr>
<td><strong>$2,499/yr + one-time $2,500 setup fee</strong></td>
<td>$3,999/yr + one-time $2,500 setup fee</td>
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</table>

800-422-7285
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>
<th>CPE Credits</th>
<th>ICBA Member Enrollment</th>
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<td>Introduction to Auditing</td>
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<td>$2,499/individual</td>
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<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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<td></td>
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<td>Lending Regulation</td>
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<td>Deposit Regulation</td>
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<tr>
<td>Other Federal Regulations</td>
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<tr>
<td><strong>Human Resources Generalist (Federal or California Specific)</strong></td>
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<td>HR Law</td>
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<tr>
<td>Leaves of Absence</td>
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<td>Performance Management</td>
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<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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<td>$499/individual</td>
<td>$999/bankwide</td>
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<tr>
<td>Banking Finance</td>
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<td>$999/bankwide</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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<td><strong>Teller Specialist</strong></td>
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<td>Teller Basics</td>
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<td>$399/individual</td>
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<td>Customer Service</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>
<td>20</td>
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<td>Customer Relationship-Building</td>
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<tr>
<td>Cross-Selling</td>
<td></td>
<td>$999/bankwide</td>
<td>$1,999/bankwide</td>
</tr>
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</table>
Good Governance Matters
Learn and grow with community banking’s best.

BANK DIRECTOR PROGRAM

WHY JOIN?
Your bank’s one-year subscription gives your entire board access to the very best corporate advice and knowledge.

ON-DEMAND TRAINING
Build director confidence and ensure your board understands its core responsibilities with 20 self-paced online courses or the seven-part Bank Director Video series.

EXPERT ADVICE WHEN YOU NEED IT
Corporate governance or employment law concerns? Your subscription includes direct access to attorneys and consultants from Gerrish Smith Tuck and Jackson Lewis.

CONSISTENT INFORMATION AND INDUSTRY ANALYSIS
Delivered bi-monthly, either electronically or in print, the Bank Director Newsletter keeps you informed on topics spanning regulatory compliance, fiduciary duties, fintech, and more.

SAVE BIG WITH YOUR SUBSCRIPTION
Bank Director Program subscribers receive substantial discounts on educational seminars like the Bank Director Forums or Annual Directors Conference, plus deals on reference guides, training aids, and more.

Only $795 for your whole board. Subscribe at icba.org/BDP
Join community bank directors from across the U.S. to learn about today’s most pressing corporate governance issues. Confirmed sessions include:

- 10 Things Every Director Needs to Know Now!
- Asset and Liability Management
- Moderated Banker Panel
- Being a Bank Director is Risky! How to Protect Yourself
- Data and Analytics
- Employment Law Issues for Directors
- Is Your Website an Online Brochure or a Place to do Business?

We’re adding more sessions to the schedule! See the latest speaker and session announcements at icba.org/adc.

Register today!  icba.org/adc

Join the ICBA Bank Director Program and save $200 off registration!
Trending Topics

UNLIMITED WEBINAR PASS

HERE’S A TASTE OF WHAT’S COMING UP:
» Quarterly Regulatory Compliance
» Cannabis in Banking
» Improving Credit Write Ups
» Customer Due Diligence Best Practices
» BSA/AML Model Evolution in a Rapidly Changing World
» Handbooks: What You Need to Have, Add, or Change
» Measuring and Managing Liquidity
» Maintaining Your CECL Model (on-demand)

SUBSCRIBE TODAY FOR:
» 12 months of in-depth learning on topics from BSA to climate risk.
» Real time and on demand viewing options.
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