



THE ART OF **BALANCE**

Stabilizing for Success

SCHEDULE AT A GLANCE



THE ART OF **BALANCE**

n. achieving stability between contrasting, opposing, or interacting elements

Just as your car runs more smoothly ... when the wheels are in perfect alignment, so too does your organization perform better when your business strategies, goals, culture and execution are in **BALANCE**. Finding the right **BALANCE** and maintaining it however requires a constant reflection on the variables that drive and impact success.

Join us this fall at this premier gathering of the Ohio banking industry as we explore what it takes to master The Art of **BALANCE**.

Balance is the key to everything. What we do, think, say, eat, feel, they all require awareness and through this awareness we can grow.

-Koi Fresco

THURSDAY

SEPTEMBER 26

- 1 – 5 p.m.**
Convention Registration
- 3 – 5 p.m.**
Directors Workshop
- 4 p.m.**
Fairmont Princess
Check-in
- 5:30 p.m.**
Welcome Reception
- 6:30 p.m.**
Dinner on Your Own

FRIDAY

SEPTEMBER 27

- 6 a.m. – 9 p.m.**
Guest Program – All Day
Spa Pass
- 7 a.m. – 12 p.m.**
Financial Services
Marketplace
- 7 – 8 a.m.**
Breakfast in the Expo
- 8 – 10:30 a.m.**
Opening General Session
- 9:30 – 10:30 a.m.**
Guest Program –
Aerial Yoga
Demonstration
- 10:30 – 11 a.m.**
Networking Break
in the Expo
- 11 a.m. – 12 p.m.**
Concurrent Breakout
Sessions
- 12 – 1 p.m.**
Picnic on the Plaza
- 1:30 – 6 p.m.**
Explore Scottsdale –
Optional Activities
- 6 – 9 p.m.**
Dinner on Your Own
- 9 – 10 p.m.**
Foundation FUN-Raiser

SATURDAY

SEPTEMBER 28

- 7 a.m. – 12 p.m.**
Financial Services
Marketplace
- 7 – 8 a.m.**
Breakfast in the
Exhibit Hall
- 8 – 9 a.m.**
Concurrent
Breakout Sessions
- 9 – 9:30 a.m.**
Networking Break
in the Expo
- 9 – 11 a.m.**
Guest Program –
Living Jewelry
Workshop
- 9:30 a.m. – 12 p.m.**
Closing General
Session
- 12 p.m.**
Lunch on Your Own
- 12:30 – 5:30 p.m.**
Convention Golf
Outing (TPC
Stadium Course)
- 1:30 – 6 p.m.**
Explore Scottsdale/
Optional Activities
- 6:30-9:30 p.m.**
Chairman's
Reception
& Closing Banquet

SUNDAY

SEPTEMBER 29

- 11 a.m.**
Fairmont Princess
Check-out

FAIRMONT SCOTTSDALE PRINCESS

7575 E. Princess Drive • Scottsdale, AZ 85255 • Tel. 480-585-4848
www.fairmont.com/scottsdale

THE ULTIMATE DESERT OASIS

Nestled in the iconic Sonoran Desert, the Fairmont Scottsdale Princess welcomes guests to a magnificent getaway. Celebrating 27 consecutive years of AAA/CAA Five Diamond Service, the highly acclaimed Scottsdale Princess is truly an experience like no other with:

- Five top-ranked Arizona restaurants and bars
- Inspiring indoor and outdoor meeting facilities
- Innovative spa and fitness programs at Well & Being Spa
- Six sparkling pools, including the Sunset Beach pool complete with white sand
- Two 18-hole championship golf courses—one of which is home to the Annual PGA Tour Waste Management Phoenix Open

ACCOMMODATIONS/RESERVATIONS

Online: <https://book.passkey.com/go/ohiobankersleague19>

Toll Free: 800-344-4758 (Be sure to ask for the OBL Convention Rate)

The Fairmont Princess offers exceptional accommodations. Each spacious room is meticulously detailed with unique Southwestern décor and includes an exterior balcony.

Discounted Convention rooms are reserved for registered Convention participants ONLY.

Convention Single/Double Room Rate - \$294/night

Hotel Room Cut-off Date: Sept. 4, 2019

NOTE: The Fairmont Princess operates on the European Plan. Not included in the room rate is an additional \$12/person/day for round-trip portage and housekeeping services.

ATTIRE/WEATHER

Attire for ALL business sessions and receptions is business casual or resort casual. Closing Banquet attire is “dressy casual” (dresses for women; jacket/tie optional for men). Average desert temperatures in late September are low- to mid-90s (but then, it’s a dry heat!); overnight temperatures average in the high 60s to low 70s.

GETTING THERE/PARKING

The closest international airport to Fairmont Scottsdale Princess is Phoenix Sky Harbor International Airport (PHX). The resort is a short 25-minute drive or cab ride from Sky Harbor. Overnight valet parking is \$24/day; self-parking is \$15/day.



KEYNOTE PERSPECTIVES

General Session, Friday, Sept. 27, 8 – 10:30 a.m. (Schonbrun & Hall)

General Session, Saturday, Sept. 28, 10:30 a.m. – 12 p.m. (Vonder Heide & Ledbetter)



MIRACLES AND FATE ON 78

Ari Schonbrun, Author, Philanthropist and former CAO for Cantor Fitzgerald, New York, NY

Like every other day, on Sept. 11, 2001, Ari Schonbrun went to work at Cantor Fitzgerald, one of the world's leading financial services firms. Ari was on the 78th floor of the World Trade Center changing elevators when the first plane hit (just 14 floors above him). In the midst of smoke and chaos, Ari helped a colleague suffering third-degree burns down 78 flights of stairs to safety. Of the 662 Cantor employees on the top five floors on 9/11, **Ari was one of only four who survived.** That day, Ari says, was a moment of rebirth ... a pivotal **RE-BALANCING** point and enduring reminder about what matters most in life. His personal story of the heartbreak and hope reveals the power of creating meaningful connections to transcend the differences that often polarize and divide us from one another.



ON THE FIELD AND OFF ... WHY CULTURE EATS STRATEGY FOR LUNCH

Derrick Hall, President & CEO, Arizona Diamondbacks, Phoenix, AZ

Employing a unique “one fan at a time” concept, Derrick Hall has built one of Major League Baseball's most successful customer-focused brands. Considered by many to be among the leaders of the game, Hall is the fourth-longest tenured CEO in Major League Baseball. He focuses the organization's efforts on **BALANCING** the core values he calls the “Circle of Success” – fan experience, performance, community, culture and financial efficiency. Culture is a top priority for Hall, who believes that employees – not the customer – come first. If we recognize, reward, promote, and develop our employees, they in turn will treat our fans the way they should be treated, says Hall.



THE NEXT FIVE TECHNOLOGY CHALLENGES FACING BANKS

Jack Vonder Heide, President, Technology Briefing Centers, Oak Brook, IL

Technology strategy has become a top priority for successful banks. Customers are demanding more function at faster speeds while competitors are rolling out attractive solutions that threaten traditional lines of business. Banks must leverage both customer-facing and internal technologies to remain competitive and boards must fully understand the benefits and risks of conducting business via new digital channels. Highly-regarded technology guru Jack Vonder Heide reveals the next five technology challenges facing banks and provides advice for **BALANCING** a strategy that delights customers, improves internal efficiencies and provides a foundation for long-term growth.



THE ART OF BALANCE – WHAT'S REALLY IMPORTANT

Brett Ledbetter, Author & Executive Coach, Gainesville, FL

What separates players and people? Why do some people handle adversity better than others and achieve higher levels of success? Learn how to achieve better **BALANCE** through character development in your organization with real-life examples and time-tested advice from professional athletes, performance psychologists and some of the winningest coaches in sports history (Urban Meyer, Billy Donovan, Bob Stoops and more) ... all of whom are among Brett Ledbetter's clientele. A TedX presenter, author of two books and founder of the What Drives Winning Conference, Brett promotes stimulating conversation while serving as a thinking partner for some of the top minds in sports as they navigate the forces of high-profile environments beyond the x's and o's.

BUSINESS & INDUSTRY INSIGHTS

DIRECTORS WORKSHOP

Thursday, Sept. 26, 3 – 5 p.m.

HOW STRATEGIC IS YOUR STRATEGIC PLAN?

Brian Mischel, Partner/National Financial Services Group, BKD, LLP, Cincinnati, OH

Effective strategic planning is not just an exercise to satisfy examiners or a document to put on the shelf, but rather a rigorous process that engages employees, bank management and the board of directors in identifying goals and the actions to achieve them. Discover the key components of that process and the importance of culture and employee empowerment in strategic planning success.

BALANCING TOTAL COMPENSATION FOR YOUR TOP EXECUTIVES

Mike Blanchard, CEO, Blanchard Consulting Group, Atlanta, GA

Providing a balance of total compensation will allow your bank to attract, motivate and retain top talent. Utilizing the latest industry data, this session looks at trends in base salary, annual incentives, long-term incentives, benefits and perquisites for key officers as well as reviews the impact of relevant compensation regulation on executive pay.

CONCURRENT BREAKOUT SESSIONS

Friday, Sept. 27, 11 a.m. – 12 p.m.

GROWTH STRATEGIES IN THE NEW BANKING ENVIRONMENT

Sean Payant, Chief Consulting Officer, Haberfeld, Lincoln, NE

The old adage, “If you’re not growing, you’re dying,” continues to be applicable to not only community banks but the industry as a whole. As the race for core customer relationships, core deposits, and talent intensifies, it is imperative to have your bank positioned for growth if you want to survive ... and thrive.

RAISING CAPITAL WITHOUT GOING PUBLIC

Jeff Smith & Kim Schaefer, Partners, Vorys, Sater, Seymour and Pease LLP, Columbus, OH

There are a number of mechanisms by which institutions can and do raise capital without becoming “public” companies and incurring the expense and additional regulation that comes with SEC registration. This session will explore the various ways that institutions can raise equity and debt capital without triggering the need to engage in a full-fledged SEC registration and incurring the expense and additional ongoing oversight that SEC registration requires. It will also discuss the various securities rules and restrictions that still apply regardless of whether the institution is an SEC registrant or not.

TOTAL RETURN: A FRAMEWORK FOR TOTAL BALANCE SHEET MANAGEMENT

John Behof, Director, Performance Trust Capital Partners, LLC, Chicago, IL

Total Return has been used by some banks successfully over the years to measure and manage risk vs. individual bonds and investment portfolios. With new innovative A/L software, total return can now be used to help measure and manage risk vs. reward in liabilities and other assets including loans. This new ability to better measure and understand the risk vs. reward in the whole balance sheet allows bankers to make better decisions and overcome current limitations.

BALANCING THE GENERATIONS - ATTRACTING, RETAINING AND MOTIVATING EACH GENERATION

Flynt Gallagher, President, Compensation Advisors, Gulf Breeze, FL

Each of the four distinct generations in the workplace today have widely disparate management and learning styles – not to mention values. Explore the expectations as well as communication preferences of each generation and learn how to motivate employees to achieve company objectives. Discover what you are currently doing to “turn off” your employees and how to reward and retain your best talent.

CONCURRENT BREAKOUT SESSIONS

Saturday, Sept. 28, 8 – 9 a.m.

HOW COMMUNITY BANKS COMPETE - AND WIN - AGAINST LARGER COMPETITORS AND DIGITAL PLAYERS

Tom McGill, Profit Resources, Inc., Cincinnati, OH

Join our discussion on available strategies to grow your bank’s deposits and loans as the competition from larger banks and digital players continue to increase. This session will review product structure, sales process, pricing, and additional features that combine to create the Community Bank Advantage.

UNLOCK THE HIDDEN STRENGTHS OF YOUR COMMUNITY BANK

Jack Salvetti, Principal, S.R. Snodgrass, P.C., Cranberry Township, PA

The rapid and consistent process of change in the financial services industry and impact on community banking has been well documented and understood. Now it is time to turn the sock inside out to better understand the vast array of hidden strengths within your organization. What better place to identify and utilize these strengths to reach for next-level performance than in the strategic planning process?

HOW FUSING THE RIGHT TECHNOLOGY, DESIGN, AND DELIVERY CAN INJECT NEW LIFE INTO YOUR BANKING STRATEGY

John W. Smith, CEO, DBSI Inc., Phoenix, AZ

What does the branch of the future and transformation really mean in today’s fast-paced market? Is it a focus on engaging experiences? Shifting from transactional to advisory? Enhancing customer discovery of products and services? Finding ways to migrate transactions to more efficient channels? Enabling Universal Associates and open branch designs? Or some combination of these? Join this interactive session to understand the strategic shift required to embrace the future of banking, along with real-life examples of how to fuse all the moving parts together for a strategy to remaining relevant long into the future.

LESSONS LEARNED FROM CEO AND LEADERSHIP TRANSITIONS

Alan Kaplan, Founder and CEO, Kaplan Partners, Wynnwood, PA

With an acute shortage of leaders capable of running an institution in this complex and competitive climate, talent development and succession strategies have never been more important. This moderated panel discussion features bank leaders who have not only navigated CEO succession, but who have also successfully developed a pipeline of future leaders for key executive roles.

NETWORKING OPPORTUNITIES

Connect with industry colleagues old and new at these premier Convention social events. Establish new networks, share ideas, commensurate on challenges, discover new solutions or simply take the opportunity to relax among friends.

WELCOME RECEPTION

Thursday, Sept. 26

Pony up to the Beer Burro for a drink before heading out to dinner with friends.

PICNIC ON THE PLAZA

Friday, Sept. 27

Let our Convention Exhibitors serve you at this Southwest buffet.

OHIO BANKERS FOUNDATION FUN-RAISER

Friday, Sept. 27

Bring your dancing shoes and your wallet. Learn a little two-step, as you enjoy desserts, fun and fellowship for a good cause.

CLOSING BANQUET & ENTERTAINMENT

Saturday, Sept 28

Join us for a Native Spirits celebration and enjoy the creative music and dance traditions of the American Southwest.



GUEST PROGRAMMING

In addition to Convention educational programming, registered guests are invited to join us for all official Convention meals and receptions including the Picnic on the Plaza and Closing Banquet. Additionally, we've put together these exclusive activities just for our registered guests!

WELL & BEING SPA AERIAL YOGA DEMONSTRATION

Friday, Sept. 27, 9:30 – 10:30 a.m.

Utilizing a fabric hammock suspended from the ceiling, this unique yoga practice allows you to overcome gravity as you glide and release into each pose. Watch a demonstration of this exhilarating new exercise and then try it out for yourself.



WELL & BEING SPA PASS

Complimentary Admission on Friday, Sept. 27, 6 a.m. – 9 p.m.

Recognized as a USA Today Reader's Choice "10 Best" Hotel Spa

RE-BALANCE while you're in Scottsdale with a day at the spa. An innovative fusion of spa and wellness, Well & Being Spa offers a uniquely rewarding and deeply personalized palette of experiences that infuse life with a greater sense of vitality. Enjoy this desert oasis including a rooftop pool with private cabanas and co-ed waterfall grotto along with other amenities such as a steam room, eucalyptus inhalation room, Swedish dry sauna, hot therapeutic whirlpool, cold plunge pool, Swiss shower, fitness studio and select exercise classes. Signature spa services are an additional charge.

LIVING JEWELRY WORKSHOP

Saturday, Sept. 28, 9 – 11 a.m.

Flower Bar isn't your typical florist ... so it's no surprise this activity isn't your run-of-the-mill workshop either. Artists from this unique modern floral design studio will be on hand to help you create your own desert jewelry from an assortment of succulents and long lasting desert plants. Wear it to the banquet and then take home a conversation piece to share with friends.



OPTIONAL ACTIVITIES

Explore this Southwest desert playground with colleagues and friends on one of the organized group tours or head out on your own. The following activities are available for an additional cost. **Participation is limited. Be sure to register in advance.**



DESERT JEEP TOUR

Friday, Sept. 27, 1:30 – 5 p.m.

\$165/person (Includes all tour fees, experienced tour guide chauffeur, taxes and gratuities)

The Sonoran Desert offers some of the most scenic, rugged terrain in the western US. Enter the domain of the four-wheel drive vehicle for an off-road adventure you'll never forget. Experience the full range of emotions, from awestruck wonder at the desert's foreboding beauty to white-knuckle excitement as your seasoned driver executes the seemingly impossible. Drivers are well versed in the legends and lore of the desert, and will pass on their stories as you make your way through the beautiful surroundings.

FRANK LLOYD WRIGHT TALIESIN WEST ARCHITECTURAL TOUR

Friday, Sept. 27, 1:30 – 5 p.m.

\$80/person (Includes admission fees, private group tour, roundtrip transportation, taxes and gratuities)

In 1937, famed architect Frank Lloyd Wright designed and built a remarkable set of structures in the foothills of the McDowell Mountains, known as Taliesin West. Set amid 600 acres of Sonoran beauty in North Scottsdale, Taliesin West was more than Wright's personal winter residence and studio. It was also the home of the Taliesin Fellowship, a group of 23 young architectural "disciples" who built the complex under Wright's direction. Long regarded by architectural critics as a masterpiece, the U.S. government declared Taliesin West a National Historic Landmark in 1987.



CONVENTION REGISTRATION

REGISTRATION FEES	BY AUG. 30	AFTER AUG. 30
Member Banker or Member Service Provider	\$950	\$1050
Member Guest	\$450	\$550
Non-Member Banker	\$1250	\$1250
Non-Member Banker Guest	\$650	\$650



MUSICAL INSTRUMENT MUSEUM TOUR

Saturday, Sept. 28, 1:30 – 5 p.m.

\$60/person (Includes admission, private group tour, roundtrip transportation, taxes and gratuities)

Voted by TripAdvisor as a #1 “Must-See” destination, this extraordinary collection of more than 10,000 instruments is the World’s only Global Musical Instrument Museum. Embark on a multi-sensory magical journey that explores how so many different people and cultures expressed their emotions through music. Using state-of-the-art audio and visual technology, you will hear, see and feel the creative spirit of people from around the world playing their native instruments. The MIM features instruments and artifacts from more than two hundred countries around the world that spans musical history from ancient cultures to modern-day artists.

CONVENTION GOLF OUTING – THE STADIUM COURSE AT TPC SCOTTSDALE

Saturday, Sept. 28, 12:30 – 6 p.m. (Shotgun Start)

\$350 per person (includes greens fees, cart, lunch, tournament prizes and gratuities)

Designed by the team of Tom Weiskopf and Jay Morrish, the Stadium Course at TPC Scottsdale is a bucket list venue for true golf enthusiasts. As the PGA TOUR stop with the largest crowds of any golf event in the world, The Waste Management Phoenix Open brings immeasurable attention and respect to the Stadium Course. The course, which was renovated in 2014, is most famous for its par-3, 16th hole that transforms into “The Coliseum” and provides fans with one of the most exciting settings in professional sports. Test your skills on the same pristine fairways – maintained to PGA TOUR-quality standards year-round – as the professionals.



DON'T FORGET TO BRING YOUR BOARD

The Convention is a great opportunity for an off-site board meeting and director education. We would be happy to help facilitate logistics should you like to explore this option. Contact Melea Wachtman at 614-340-7606 or mwachtman@ohiobankersleague.com for more details or to discuss a group discount.

REFUND POLICY

Requests for refunds must be received in writing no later than Sept. 13. A \$100 processing fee for each registrant will be withheld for requests prior to that date. Cancellations received after Sept. 13 will not be refunded.

QUESTIONS

Ohio Bankers League

4215 Worth Ave., Ste. 300, Columbus, OH 43219

Tel. (614) 340-7595 Fax (614) 340-7596

Register online at www.ohiobankersleague.com

BALANCED ROCK

Situated in the heart of the Brown's Ranch cluster of trails, this mushroom-shaped behemoth stands tall and seemingly precariously exposed atop a weathered slab of igneous stone. If you're feeling adventurous and looking to appreciate some natural BALANCE ... it's a 4.2 mile roundtrip hike to the rock and back.





CONVENTION REGISTRATION

REGISTRATION FEES	BY AUG. 30	AFTER AUG. 30
Member Banker or Member Service Provider	\$950	\$1050
Member Guest	\$450	\$550
Non-Member Banker	\$1250	\$1250
Non-Member Banker Guest	\$650	\$650

Registration fees include all scheduled meetings and official meal functions.

Guest Registration

In addition to Convention educational programming, registered guests are invited to join us for all official Convention meals and receptions including the Picnic on the Plaza and the Closing Banquet. Registered guests also receive a one-day Well & Being Spa pass and are invited to join us for a special Aerial Yoga Demonstration on Sept. 27, as well as for a Living Jewelry Workshop on Sept. 28.

CONVENTION REGISTRANTS *Please copy for additional registrations.*

FULL NAME & TITLE	NICKNAME FOR BADGE	REGISTRATION FEE
	FRIDAY, SEPT 27 - Desert Jeep Tour - \$165	
	FRIDAY, SEPT 27 - Taliesin West Tour - \$80	
	SATURDAY, SEPT 28 - Musical Instrument Museum Tour - \$60	
	SATURDAY, SEPT 28 - Golf Tournament - \$350	
	FRIDAY, SEPT 27 - Desert Jeep Tour - \$165	
	FRIDAY, SEPT 27 - Taliesin West Tour - \$80	
	SATURDAY, SEPT 28 - Musical Instrument Museum Tour - \$60	
	SATURDAY, SEPT 28 - Golf Tournament - \$350	
	TOTAL	

Company Name _____

Address _____

City _____ State _____ Zip Code _____

Registration Contact _____

Tel. _____ Fax _____ E-mail _____

Please indicate the total number of Convention and Guest registrants who will be attending each of the following events:

- _____ THURS Directors Workshop
- _____ THURS Welcome Reception
- _____ FRI Buffet Breakfast
- _____ FRI Guest Program - Ariel Yoga Demo
- _____ FRI Picnic on the Plaza
- _____ FRI Foundation FUN-Raiser
- _____ SAT Buffet Breakfast
- _____ SAT Guest Program - Living Jewelry Workshop
- _____ SAT Closing Celebration

METHOD OF PAYMENT

Charge my credit card \$_____, as noted.

My check for \$_____ is enclosed.

Please make checks payable to Ohio Bankers League.

CREDIT CARD PAYMENT

☐ Visa ☐ MasterCard ☐ Discover ☐ American Express

Card # _____ - _____ - _____ - _____ Exp _____

Cardholder Name _____

Signature _____

Card Billing Address _____

To save a stamp and maybe a trip to the post office, register quick and easy online!

Online registration is available at: www.ohiobankersleague.com

OPTIONAL ACTIVITIES

Please note that these special convention activities require an additional fee and are available **ONLY** to registered Convention Participants.

Convention Golf Outing – The Stadium Course at TPC Scottsdale Saturday, Sept. 28, 12:30 – 6 p.m. (Shotgun Start)

\$350 per person (Includes greens fees, cart, lunch, tournament prizes and gratuities)

NOTE: If you prefer to play in a specific foursome, please list the names below and make sure they are registered for **both** the Convention and the Tournament.

Name _____ Company _____

Name _____ Company _____

Name _____ Company _____

Name _____ Company _____

Desert Jeep Tour

Friday, Sept. 27, 1:30 – 5 p.m.

\$165/person (Includes all tour fees, experienced tour guide chauffeur, taxes and gratuities)

Frank Lloyd Wright Taliesin West Architectural Tour

Friday, Sept. 27, 1:30 – 5 p.m.

\$80/person (Includes admission, private group tour, roundtrip transportation, taxes and gratuities)

Musical Instrument Museum Tour

Saturday, Sept. 28, 1:30 – 5 p.m.

\$60/person (Includes admission, private group tour, roundtrip transportation, taxes and gratuities)

REFUND POLICY

Requests for refunds must be received in writing no later than Sept. 13.

A \$100 processing fee for each registrant will be withheld for requests prior to that date.

Cancellations received after Sept. 13 will not be refunded.

ACCOMMODATIONS

FAIRMONT SCOTTSDALE PRINCESS

7575 E. Princess Drive • Scottsdale, AZ 85255 • Tel. 480-585-4848

www.fairmont.com/scottsdale

RESERVATIONS

Online: <https://book.passkey.com/go/ohiobankersleague19>

Toll Free: 800-344-4758 (Be sure to ask for the OBL Convention Rate.)

Discounted Convention rooms are reserved for registered Convention participants ONLY.

Convention Single/Double Room Rate - \$294/night

Hotel Room Cut-off Date: Sept. 4, 2019

NOTE: The Fairmont Princess operates on the European Plan. Not included in the room rate is an additional \$12/person/day for round-trip portage and housekeeping services.

Please complete and return with payment to:

OBL Convention Department

Ohio Bankers League • 4215 Worth Ave., Ste. 300 • Columbus, Ohio 43219 • Fax (614) 340-7596

FOR OFFICE USE ONLY

RECD	AMT	PYMT	REG	EX/SPN



THE **BALANCE** ART OF Stabilizing for Success