



PROFESSIONAL DEVELOPMENT

2023 PROGRAMMING OVERVIEW

The Ohio Bankers League provides a full range of professional development and educational opportunities for all levels within the bank – from tellers and branch managers to senior managers, c-level executives and directors. Topics range from operations, technology, lending and compliance to marketing, finance, retail, human resources and more.

As times continue to change – so does the method of OBL program delivery. Sessions are offered via online courses and webinars, as well as via in-person at the OBL Education Center or off-site venues. And in addition to the array of webinars, seminars, conferences and special events that the OBL offers each year, members can also benefit from customized in-bank programming and one-on-one professional development consultation to aid in individual and team development.



TURN THE PAGE TO LEARN MORE AND VISIT:

www.ohiobankersleague.com/professional-development.com

FOR THESE AND ADDITIONAL CALENDAR LISTINGS.

EXECUTIVE LEVEL PROGRAMS

Each year the OBL hosts four major executive level events with a focus on education and networking while delivering the latest information and trends in banking. Executive team members will also be interested in attending two advocacy events in Washington and the Statehouse.

OBL ECONOMIC SUMMIT – February 8, 2023 (Greater Columbus Convention Center)

The OBL Economic Summit, held in partnership with the Ohio Society of CPAs, features a renowned economist who provides up-to-the-minute forecasts for the upcoming year. Topics often include developments in consumption, manufacturing, housing, financial markets and employment and typically go ‘in-depth’ on how fiscal and monetary policies could affect the economy.

Chief lending officers and a bank’s best business clients are also encouraged to attend this program.

QUICK FACT

Over **200** attendees participated in the 2022 OBL CEO Symposium

OBL CEO SYMPOSIUM – May 16 & 17, 2023 (Hilton Columbus at Easton)

This two-day program is designed for presidents, CEOs and those identified as key succession leaders within an organization. The content covers regulatory issues, and insight on innovative products to keep executives current on industry trends.

OBL/IBA ANNUAL CONVENTION – June 21 – 24, 2023 (Fairmont Chicago Millennium Park)

A multi-day premier gathering of the Ohio and Illinois banking industries. Featuring workshops, the OBL BankServices Marketplace, breakout sessions, keynotes, networking events and more. The program also provides a great opportunity for an off-site board meeting and director education.

NEW

THE MAIN EVENT – November 6 – 8, 2023 (Hyatt Regency Columbus)

This is THE MAIN EVENT - an expanded Annual Meeting and in-state convention featuring keynotes, industry-specific learning tracks, the OBL BankServices Expo, networking opportunities and more.

OBL DC FLY IN – February 28 – March 2, 2023 (Washington, D.C.)

Ohio bankers will be in Washington D.C. to advocate for right-sizing bank regulation, fairer taxation in financial services and other banking industry priorities at the annual OBL D.C. Fly-in. OBL members will meet with Ohio senators and representatives, as well as key figures at all of the federal regulatory agencies.

OBL DAY AT THE CAPITOL – Date and Location TBD

Bankers join more than 100 colleagues at the state’s premier state banking advocacy event. OBL members meet with state representatives and senators, as well as key staff from the Ohio Division of Financial Institutions.

NEW

SOCEITY OF BANK EXECUTIVES – Virtual and in-person

This new national member organization provides senior bank executives with opportunities to enhance critical leadership competencies and build a vibrant network of peers so they can thrive in the unique and rapidly changing banking landscape. Features ongoing in-person and online learning from Franklin Covey and others to assist executive teams with actively build and maintain a vibrant network of non-competing peers.

MIDWEST CEO FORUM – Dates TBD (Chicago, IL)

This six-state regional program provides instant access to a confidential, best-fit peer group that is sure to form lifelong connections. This forum is designed to curate an inner group of high-performing CEOs and senior executives representing financial institutions from \$750MM - \$10B in assets to discuss industry best practices, issues and challenges.

CEO MONTHLY ROUNDTABLE CALLS

These monthly roundtable calls (broken out by asset size) allow bank presidents and CEOs the opportunity to discuss hot topics with their peers as schedules allow. Reach out to Evan Klemeyer at eklemeyer@ohiobankersleague.com for additional information.

MANAGEMENT & LEADERSHIP PROGRAMS

OBL NEXT GEN CONFERENCE – June 8 & 9, 2023 (Greater Columbus Convention Center)

Designed for emerging leaders, this annual conference features a leadership workshop, an executive panel discussion, breakout sessions and banking specific roundtables led by members of the OBL Next Gen Advisory Board. Networking receptions provide additional peer sharing and learning opportunities.

OBL BANK MANAGEMENT SCHOOL – September 17 – 21, 2023 (OBL Education Center)

This comprehensive program includes courses on financial management, asset liability management, liquidity management, bank investments, consumer behavior and cybersecurity. In addition, participants complete an intensive bank simulation program that allows them to experience the difficulty and impact of the tough decisions involved when running a bank. Two pre-work assignments are also required.

OBL BANK LEADERSHIP INSTITUTE – Class of 2023-2024 kicks off Sept. 14 & 15, 2023 (OBL Education Center)

Designed to mold potential officers into high achievers, BLI generates leaders who are better able to recognize and develop talent, build effective teams and get results for their institutions. Students strengthen their own leadership abilities and their organizations' success through enhanced leadership, as well as organizational and performance skills. Students meet over four sessions, and includes participation in the OBL DC Fly-In.

WOMEN IN BANKING CONFERENCE – October 13, 2023 (Quest Conference Center)

This conference is designed to inspire and empower female bankers and give women an understanding that success can be achieved at any level given the right tools and knowledge. The program offers the opportunity to network with other professional women and discuss similar challenges and solutions.

STEPPING UP TO SUPERVISOR – May 3 (OBL Education Center)

New supervisors and managers with less than one year experience, as well as experienced supervisors with little or no formal supervisor training, and soon-to-be-promoted supervisors will benefit from this program. During this interactive workshop, participants will learn to: make the transition from team member to supervisor; avoid 5 Supervisory "Traps" that turn people off; ask good questions and become a good listener; build a productive team and more.

GRADUATE SCHOOL OF BANKING AT THE UNIVERSITY OF WISCONSIN-MADISON – July 30 –

August 1, 2023

The OBL proudly partners with GSB, the nation's most comprehensive and respected banking school, as it provides students with a curriculum that is uniquely tailored to meet the professional development needs of today's banking leaders. For more details about this three-year program, visit www.gsb.org. Scholarship opportunities are available via the OBL. Contact Susan Poling Jones at spoling@ohiobankersleague.com.

SUMMER BANKING INSTITUTE



Did you know the OBL expanded the Summer Banking Institute statewide in 2022 to educate rising college students about the banking industry? Students participate in a classroom program followed by an internship experience at an OBL member bank. To find out how your bank can sponsor or host a banker in 2023, contact Kimberley Mason at 614-340-7601.

"The experience of hosting an intern through the OBL's Summer Banking Institute was nothing short of ENERGIZING, INSIGHTFUL, and INSPIRING! We learned right alongside her as she shared her own diverse experiences and perspective with us here at LCNB. We are proud to be a part of such a unique initiative to identify and grow our future talent."

– Laura Tiller, SVP, HR & Talent Development, LCNB National Bank

PROGRAMS BY TOPIC

HUMAN RESOURCES & EDUCATION

HR FORUM – March 15, May 10 & September 28 (OBL Education Center); and November 7 & 8 (OBL Main Event at Hyatt Regency Columbus)

This year-long program offers the free exchange of ideas and formulating collaborative solutions to current problems. Participants set each session's agenda based on their needs and current trends. Includes a seat at the OBL Main Event, featuring an HR Track where experts will share topical and relevant information, while allowing for networking, best practices and idea sharing.

EDUCATORS & TRAINERS FORUM – March 9, August 31 & October 5 (Virtual); and November 7 & 8 (OBL Main Event at Hyatt Regency Columbus)

This year-long program offers the free exchange of ideas and formulating collaborative solutions to current problems. Participants set each session's agenda based on their needs and current trends. Includes a seat at the OBL Main Event, featuring an HR Track where experts will share topical and relevant information, while allowing for networking, best practices and idea sharing.

GSB HUMAN RESOURCES MANAGEMENT SCHOOL – March 27 – 31 (Madison, WI)

Week-long HR management program offered through the Graduate School of Banking at the University of Wisconsin.

MARKETING

MARKETING FORUM – March 23, May 18 & August 24 (OBL Education Center) and November 7 & 8 (The Main Event at Hyatt Regency Columbus)

This year-long program offers the free exchange of ideas and formulating collaborative solutions to current problems. Participants set each session's agenda based on their needs and current trends. Includes a seat at the OBL Main Event, featuring a Marketing Track where experts will share topical and relevant information, while allowing for networking, best practices and idea sharing.

CREATING CONTENT WITH A CLICK: A HANDS-ON VIDEO WORKSHOP - September 27 (Virtual)

Take videos for social media, marketing and communication to the next level – all on a budget-friendly bootstrap. In this workshop, learn a dozen easy tech tools to create amazing presentations while also honing storytelling and image-creation skills. The program will also introduce new AI text-to-image tools to evaluate which multimedia tools are best.

GSB SALES & MARKETING SCHOOL – September 25 – 29, 2023 (Madison, WI)

Week-long sales and marketing program offered through the Graduate School of Banking at the University of Wisconsin.

What is The Main Event?

The [Main Event](#) is the Ohio Banking Industry's Premier Professional Development and Networking Event. For the first time ever, the Ohio Bankers League will combine the annual business meeting and BankServices Expo with three days full of education for job functions throughout the bank. Some of the educational tracks include marketing, human resources, lending, finance and executive level leadership. Attendees will converge at the Hyatt Regency in downtown Columbus and can expect a second-to-none experience.

PROGRAMS BY TOPIC

RETAIL

NEW

FRONTLINE BRANCH SERIES – *February 1, March 1, March 22 & April 26 (Virtual)*

This program, which can be attended as a series or stand-alone sessions, is a comprehensive program for beginning and new community bank professionals. The program will provide: an understanding of the challenges in community banking; an opportunity to learn about the best user/customer experience; the ability to plan for the impact of technology, artificial intelligence and self-service.

BRANCH MANAGER BOOT CAMP WEBINAR SERIES – *Next Session Dates TBD*

These programs, which can be attended as a series or stand-alone sessions, will focus on the next generation manager who will lead the transition to client relationship management. The program will focus on the critical skills and expectations that need to be developed including Leading Service Excellence, Business Development, Maintaining Superior Team Performance and Managing a Successful Branch.

RETAIL FORUM – *March 30, July 27 & October 24 (OBL Education Center); and November 7 & 8 (OBL Main Event at Hyatt Regency Columbus)*

This year-long program offers the free exchange of ideas and formulating collaborative solutions to current problems. Participants set each session's agenda based on their needs and current trends. Includes a seat at the OBL Main Event, featuring a Retail Track where experts will share topical and relevant information, while allowing for networking, best practices and idea sharing.

IRA SESSIONS – *Check the OBL website for program dates*

Presented in partnership with PMC, OBL IRA sessions focus on a variety of IRA-related topics for beginners and advanced learning. Offered in locations across Ohio, these sessions include content such as contributions and deductions, portability, taxation of distributions, lifetime RMDS, death distributions, current news and trends, beneficiary issues and documentation, and reporting requirements.

OHIO DEPOSIT ACCOUNT DOCUMENTATION – *April 18 (OBL Education Center)*

Become familiar with state law requirements for ownership and documentation, while learning the "why" behind standard operating procedures. The program also covers CIP procedures and IRS Reporting compliance issues. Main topics include: account opening procedures, taxpayer ID number documentation, account titling, proper documentation and handling requests for account changes.

GSB DIGITAL BANKING SCHOOL – *April 3 – 27, 2023 (Virtual)*

Banking continues to evolve – and as consumer preferences have moved from lobby to service multi-channel, multi-touch interactions, the demand for digital banking services has grown exponentially. This program is the first school of its kind – focused exclusively on demystifying these sometimes-intimidating topics – to help community banks move into and/or grow in the digital banking space. Eight virtual sessions will be held throughout the noted dates.

BSA

BSA/AML CONFERENCE & PRE-CONFERENCE – *February 27 & 28, 2023 (Virtual)*

This program focuses on all applicable BSA activity over the last 12 months; and an optional pre-conference covers BSA Basics. The agenda for this annual conference changes each year and typically includes (as applicable) an overview of recent FinCEN activity, as well as applicable case studies, industry hot topics, and an interactive round table discussion.

BSA GRADUATE SCHOOL – *September 26 & 17 (OBL Education Center)*

This program is offered every other year and addresses the challenges of managing an effective BSA program. Designed for BSA professionals who are competent in the core requirements of Bank Secrecy Act rules, the schools provides a higher level of lecture, training and interactive discussion regarding the challenges of developing and managing an effective BSA program.

PROGRAMS BY TOPIC

COMPLIANCE

HMDA WEBINAR - RECORDED DECEMBER 2022

Time sensitive! In 2020, the CFPB raised the limit for required compliance from 25 to 100 closed-end loans. A court forced the CFPB to move it back down to 25 loans for 2023. Banks that have made at least 25 loans for closed-end mortgage products in 2021 and 2022 are now required to comply with HMDA in 2023. Learn all you need to know in this recorded program with Young & Associates, Inc.

COMMUNITY BANKERS FOR COMPLIANCE

PROGRAM – *March 7 & 8 and December 12 & 13 (Virtual). June 6 & September 12 (Findlay); and June 7 & September 13 (OBL Education Center)*

Held in partnership with Young & Associates, Inc., this program provides member banks with up-to-date information on ever-changing regulatory framework and offers guidance for structuring and maintaining an in-bank compliance program. It also provides a forum where those responsible for regulatory compliance can discuss issues and exchange ideas with their peers.

OBL REGULATOR ROUNDTABLE –

August 4 (Hybrid- OBL & Virtual Options)

Designed to address continued regulatory changes, the 2023 OBL Regulator Roundtable offers time to hear from examiners firsthand, ask questions ahead of time and/or during the program, plus provides the opportunity to share best practices with others.

FALL COMPLIANCE SCHOOLS –

Modules for Reg Z - October 19 & 20; and Lending Compliance - October 26 & 27

These sessions provide the cornerstone to build and manage an effective in-bank compliance program, and provides a thorough understanding of the major “must knows” for compliance officers. The two programs can be attended as stand-alone programs or as a pair.

COMPLIANCE MANAGEMENT SCHOOL –

Offered next in 2024

This advanced school is designed specifically for those who want to upgrade their skills in compliance management, as well as their ability to influence others to solve compliance problems facing their bank. The program is offered on an every other year basis, opposite the BSA Graduate School.

FREE FOR ALL MEMBERS

OBL members have access to a leading online compliance learning provider, Regulatory University, formerly Compliance Coach. This partnership provides member institutions with many benefits, including:

- Access to 40 web-based programs at no cost.
- Tools to track program completion for team members.
- Access 24 hours a day, 7 days a week, 365 days a year.
- Updated courses to receive instant access to training on the latest rule changes.

The following online courses are available **free** to members with unlimited access:

- BSA/AML Awareness
- Anti-money Laundering for Business Bankers
- Anti-money Laundering for Commercial Lenders
- Anti-money Laundering for Consumer Lenders
- Anti-money Laundering for Mortgage Lenders
- Anti-money Laundering for Personal Bankers
- Anti-money Laundering for Tellers
- Anti predatory Lending
- Awareness - Check 21
- Awareness - Ethics
- Fair & Responsible Lending
- Awareness - Truth in Savings Act
- Commercial Lending - Avoiding Problem Loans and Compliance Pitfalls
- Commercial Lending - Credit Analysis
- Commercial Lending - Loan Commitment and Documentation
- Commercial Lending – Loan Maintenance and Renewals
- Currency Transaction Reporting
- Customer Identification (CIP) Basics
- Mortgage Fraud Awareness
- Equal Credit Opportunity Act for Mortgage Lenders
- Teller Training - Check Holds
- Training - Check Fraud Awareness
- Fair Lending Refresher
- Fair Credit Reporting Act for Lenders
- FDIC Insurance Basics
- Flood Insurance Requirements
- HMDA Data Collection
- HMDA Reporting and Disclosure
- ID Theft Red Flags Rule
- Loans to Insiders
- Regulation D
- RESPA for Mortgage Lenders
- Suspicious Activity Reporting
- Truth in Lending Act - Closed End for Mortgage Bankers
- Truth in Lending Act - Home Equity Lines of Credit
- Reporting Elder Financial Abuse
- Awareness: Physical Security
- FCRA for Information Furnishers – Basics
- Sexual Harassment
- Diversity in the Workplace

FIS also offers a special discount to OBL Members choosing to upgrade to its Premium Package and can schedule an online training demo.

Contact Julie Kiplinger at
jkiplinger@ohiobankersleague.com
for more information.

PROGRAMS BY TOPIC

LENDING

COMMERCIAL LENDING FORUM – April 6, July 13 & Sept. 21 (OBL Education Center); and OBL Main Event - Nov. 7 & 8 (Hyatt Regency Columbus)

This year-long program offers the free exchange of ideas and formulating collaborative solutions to current problems. Participants set each session's agenda based on their needs and current trends. Includes a seat at the OBL Main Event, featuring a Lending Track where experts will share topical and relevant information, while allowing for networking, best practices and idea sharing.

NEW

MORTGAGE LENDING FORUM – March 16, May 25 & July 20 (OBL Education Center) and OBL Main Event - Nov. 7 & 8 (Hyatt Regency Columbus)

The new 2023 OBL Mortgage Lending Forum is a multi-part program created to build peer networks and strengthen job performance through idea exchange and presentations on current mortgage lending topics. Includes a seat at the OBL Main Event, featuring a Lending Track where experts will share topical and relevant Education Center); and November 7 & 8 (OBL Main Event at Hyatt Regency Columbus)information, while allowing for networking, best practices and idea sharing.

FUNDAMENTALS OF COMMERCIAL BANKING – February 23 (Virtual)

Commercial banking can be intimidating due to its complexity and the risk-oriented nature of the work. This course is a clear and thorough introduction to the key concepts, terminology and processes involved in credit and lending. This course is ideal for those without much prior knowledge of the topic and for those in their first year in the industry. Learners will walk away with a clear understanding of their job and how their specific role fits into the bank's overall profitability goals.

NEW

OUTSIDE CALLING SCHOOL – February 9 & 16 (Virtual)

The program is for the professional caller, including lenders, mortgage originators and wealth managers, as well as experienced branch managers. This program includes pre-call planning, the in-person or virtual appointment and post-call follow up. The course also covers negotiation, handling objections and pricing.

TRID – May 12, 2023 (Virtual)

This one-day seminar is designed to enhance understanding of the regulatory requirements of TRID with a focus on documents and timing of documents; pitfalls review; and discussion on the risk of errors and the decision-making processes to avoid negative outcomes.

AG LENDING CONFERENCE – August 17, 2023 (TBD)

Explore the latest information and trends in ag lending. This conference is designed for ag lenders, credit managers and analysts, as well as any lender who manages ag credits. Bank CEOs and senior executives will also benefit from the program that highlights outstanding national/local speakers and provides time for networking and sharing of best practices.

MIDWEST AGRICULTURAL SCHOOL – November 27 – 30, 2023 (West Lafayette, IN)

The curriculum is designed to provide early career bankers with the practical aspects of agricultural credit and finance, farm management, marketing and related subjects. Sessions use practical examples through the use of presentations, exercises, case studies, panel discussions and real life scenarios to provide an engaging experience.

COMMERCIAL CREDIT SCHOOL – November 28 & 29 (OBL Education Center)

Using real-life business case studies, this school provides a deeper understanding of credit analytics and applies a structured industry analysis tool. The school brings together core and advanced elements of business lending and credit evaluation.

PROGRAMS BY TOPIC

LENDING

NEW

ADVANCED COMMERCIAL CREDIT WORKSHOP - November 30 - December 1 (OBL Education Center)

This workshop is the next level of training for bankers with 5+ years of experience. It is case-driven, using real businesses with reporting issues. Attendees will participate in hands-on training with guidance on how to proceed; and will have a deep dive into CRE, as well as share ideas on ways to underwrite.

AMERICAN MORTGAGE CONFERENCE- May 1-3 (Wild Dunes Resort, Isle of Palms, SC)

The NC Bankers Association, ABA, OBL and additional state associations partner to bring leading experts in mortgage lending and policy together to discuss the mortgage business, analyze Washington's progress and get realistic strategies to maximize profitability.

FINANCE

CFO FORUM – February 22, May 24 & September 26 (Hampton Inn & Suites); plus the November 7 & 8 OBL Main Event (Hyatt Regency Columbus)

This year-long program offers the free exchange of ideas and formulating collaborative solutions to current problems. Participants set each session's agenda based on their needs and current trends. During each session, members are divided into two groups based on bank size and market. Includes a seat at the OBL Main Event, featuring a Finance Track where experts will share topical and relevant information, while allowing for networking, best practices and idea sharing.

GSB FINANCIAL MANAGERS SCHOOL – September 18 – 22 (Madison, WI)

Week-long financial management program offered through the Graduate School of Banking at the University of Wisconsin.

SECURITY, TECHNOLOGY & OPERATIONS

SECURITY & TECHNOLOGY CONFERENCE – April 12 – 14, 2023 (Embassy Suites Columbus Airport)

Experts explore the latest information and trends with attendees who network and share best practices and ideas across institutions. Day 1 features a Security Track; while Days 2 & 3 feature a Tech Track. The program also includes an OBL BankServices Expo

IT FORUM – April 12 - 14 (Embassy Suites Columbus Airport), May 24, August 23 & November 14 (Quest Conf. Center)

This year-long program offers the free exchange of ideas and formulating collaborative solutions to current problems. Participants set each session's agenda based on their needs and current trends. Includes a seat at Tech Track within the OBL Security & Technology Conference.

BANK TECH CONFERENCE – TBD (Virtual and In-Person, Chicago)

This annual program features experts and innovators in the Fintech space to help banks identify innovative products, services and potential partnerships with Fintech companies, while considering risk factors in the development of Fintech strategy and associated processes. Offered in partnership with IL Bankers and other Midwest state banking associations.

GSB BANK TECHNOLOGY MANAGEMENT SCHOOL – April 17 – 21 (Madison, WI)

Week-long IT management program offered at the Graduate School of Banking at the University of Wisconsin.

GSB BANK TECHNOLOGY SECURITY SCHOOL – October 16 – 20 (Madison, WI)

Week-long information technology (IT) Security program offered at the Graduate School of Banking at the University of Wisconsin.

PROGRAMS BY TOPIC

SECURITY, TECHNOLOGY & OPERATIONS

SBS INSTITUTE

The SBS Institute serves community banks by providing online educational programs that will certify a banker has the knowledge and skills to protect against today's information security threats. Nearly a dozen certifications are available. Visit www.sbscyber.com/education for program details.

GENERAL

ESSENTIALS OF BANKING – *January 26, February 16, March 23 & April 20 (Virtual)*

This four-part series provides a complete overview of banking principles and operations and is a must for new and seasoned employees to deepen their banking knowledge. Programs can be attended individually or as a series. Topics include: Overview of Banking; Business Operations and Management; Credit and The Banking Business; Providing Exceptional Service; and more.

BANKING FUNDAMENTALS – *ABA (Online)*

This course includes three 4-week courses that combine the principles of the banking industry with real-world application. Ideal for new bankers, or bankers seeking to gain an understanding of the changing world of financial services. It is an online, paperless, series of courses that combines peer collaboration with instructor guidance. Courses include: The Banking Industry; Bank Lines of Business; and Building Customer Relationships.

CALL REPORT – *March 21 (OBL Education Center)*

This one-day session will focus on equipping community bankers with the fundamental knowledge necessary for completing an accurate and efficient Call Report. The program will guide call report preparers through the complicated instructions and provide clarity to common reporting challenges, as attendees learn General Information Related to the Call Report; and review Balance Sheet Schedules Effecting Regulatory Capital.

DIRECTORS

FINPRO GLOBAL WEBINAR PACKAGE – *Offered two times/month - Live & OnDemand*

This multi-faceted educational series offered via the OBL and FinPro is designed specifically to help add value to your institution and reduce risk, provide valuable learning and develop strong leadership. The Global Webinar Package provides directors and senior management with the opportunity to demonstrate that the bank is keeping abreast of industry developments and trends in a highly effective manner.

THE DIRECTORS EDUCATION SERIES™

This library of courses focuses on the role and expectations of the Bank Director's conduct, duties and liabilities. These programs have been authored by a group of highly recognized, respected industry experts. A subscription to this series assists with the responsibility to educate those who serve on the Board. One annual subscription provides a financial institution access to the entire course library with a new course published each month.

For customized OBL In-Bank Director Training opportunities please reach out to Julie Kiplinger at jkipliner@ohiobankersleague.com.

PROGRAMS BY TOPIC

WEALTH & TRUST MANAGEMENT

MIDWEST WEALTH & TRUST MANAGEMENT CONFERENCE – Oct. 11 – 13 (*The Inn at St. John's, Michigan*)

The annual Midwest Trust and Wealth Management Conference, presented in partnership with the Michigan Bankers Association, is a must for wealth management and trust professionals. The program features top-notch speakers and provides continuing education credit (CTFA, CFP, CPE) as well as valuable networking opportunities.

ONLINE LEARNING

To minimize the need for travel and provide educational opportunities to better suit the busy working schedules and lives of banking professionals, the OBL incorporates online learning. Programs are offered through multiple partnerships.

ONCOURSE LEARNING

OnCourse Learning solutions brings hundreds of cutting-edge webinars to all bank functions at all levels. Three program options are available:

- **Live Webinars** – These sessions provide up-to-date information in an interactive format. Any applicable fees apply to a location, not an individual.
- **On-Demand Webinars** – These sessions capture the content of live webinars. Any applicable fees include unlimited playback for 6 months after the live webinar date and an accompanying CD and handouts for offline viewing.
- **Save Valuable Dollars! Subscriptions** – Professional development expenses can be greatly reduced with a webinar subscription package.

AMERICAN BANKERS ASSOCIATION OFFERINGS

ABA Training includes extensive learning opportunities suited to specific job roles, in both facilitated and self-paced online formats. Many courses meet the requirements of the Institute of Certified Bankers (ICB) for exams or continuing education credits. OBL members receive ABA pricing.

GRADUATE SCHOOL OF BANKING – MADISON

Nearly 100 e-learning options are also available via the GSB Online Seminars, offering a convenient, cost-effective way to access quality educational opportunities. Programs are designed to meet the dynamic learning needs of today's busy financial professional and are delivered by some of today's top industry experts across all areas of the bank, including: A/L Management; Compliance; Directors; Funding General Banking; HR Management; HSA Training Programs; IRA Training Programs; Lending Management; Marketing; Relationship Banking; and Technology.

OBL PARTNER WEBINARS – LEAD SERIES

Other complimentary and fee-based webinars are offered throughout the year by OBL Affiliate Members and Partners. Information on these programs are shared on the OBL website, through email communications, and through OBL BankServices Newsletter and OBL Direct.

GSB LENDING LIBRARY WITH RICHARD HAMM – *Virtual*

The Graduate School of Banking offers a comprehensive library of lending-focused seminars ideally suited for commercial and consumer lenders alike. Programs are also available as stand-alone webinars. A registration fee discount applies when programs are purchased together. Visit www.gsb.org/schools-programs/online-seminars for more details.

PROGRAMS BY TOPIC

IN-BANK EDUCATION & CONSULTATION

CURRICULUM DEVELOPMENT/CAREER PATHING

The OBL's curriculum development service can support in-house education functions in preparing a plan for developing: the Board of Directors, senior level executives, employees new to banking, employees new to their current positions, employees preparing for a cross-functional move, or high potential employees preparing for leadership. Career Pathing curriculums are available for the following functions:

- Branch Manager
- Compliance
- Director
- Head Teller/Teller Supervisor
- Human Resources
- Lending – Commercial, Consumer, Mortgage
- New Account Representative/Personal Banker
- Universal Banker

IN-BANK PROFESSIONAL DEVELOPMENT

The OBL offers customized In-Bank Professional Development solutions tailored to individual bank policies, procedures, mission and corporate culture. Delivered by OBL staff, an external industry expert, or through pre-packaged materials that can be conducted for large or small groups, or via one-on-one sessions. For more information please reach out to Julie Kiplinger at jkiplinger@ohiobankersleague.com to discuss your specific needs.

STRATEGIC PLANNING RESOURCES

OBL business partners and affiliate members are available for strategic planning for your executive team and board members resulting in a customized strategic plan that builds a shared vision and leads to action. For more information please reach out to Michelle Crume mcrume@ohiobankersleague.com to discuss your specific needs.

"Ohio bankers are blessed to have access to one of the strongest, if not THE strongest, state banking associations in the country. Reliable and reputable service providers play a key role in the success of the OBL. The investment of OBL Endorsed Business Partners and Affiliate Members in the association through their memberships in conjunction with event sponsorships and exhibits throughout the year affords the OBL the ability to secure top-notch speakers and create valuable networking opportunities. Their generous support allows OBL members to consistently increase their knowledge and sharpen their skills to strengthen Ohio's banking industry together."

-Justin Dinovo, President & Director, Citizens Federal S&L Assoc. of Bellefontaine

DOWNLOAD OBL ENGAGE APP!

Visit the App Store on your phone or tablet and download the OBL Engage App for industry specific news, content, event information, resources and more!

DO YOU HAVE PROFESSIONAL DEVELOPMENT NEEDS?

Schedule a consultation with one of our Education Managers!

FOLLOW US ON SOCIAL MEDIA



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Ohio Bankers League



Ohio Bankers League



Ohio Bankers (@ohiobankers)

OBL PD TEAM

The OBL's expert professional development team is accessible to provide more information on the full range of opportunities available to bankers. Please visit the OBL website at www.ohiobankersleague.com or reach out to the OBL PD Team for answers to your questions and education needs.



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Next Gen Conference; Social Media; programming questions; and registration assistance



VISIT:

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