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CBAO
HORIZON
BANKERS
CONFERENCE

COURTYARD RIVER VILLAGE
750 IH 35 NORTH
NEW BRAUNFELS, TEXAS 78130

ATTENDEE BROCHURE

AGENDA

LOCATION FOR ALL CONFERENCE SESSIONS:
COURTYARD RIVER VILLAGE: BLANCO/COMAL

SUNDAY, JUNE 6TH

Travel Day - Arrive at Your Leisure

5:00pm - 6:30pm

Welcome Reception - Courtyard River Village (Rockpad); 750 IH 35 North New Braunfels, Texas
78130 - Attendees and Families Welcome

A very casual Sunday Funday Evening! Enjoy yummy refreshments and light appetizers on the Rockpad looking over the beautiful Comal River!

MONDAY, JUNE 7TH

8:00am

Registration and Networking Breakfast –
Attendees Only

8:30am

Making Sure You Look GREAT Online - Tim Priebe

When people consider doing business with you, most of them look you up online first. How do you look? How does your bank look? Learn what factors into that and what you can do to put your best foot forward on the internet.

9:15am

Refreshment Break

9:25am

Pitfalls to Avoid When Selecting an IT Provider - Cal Roberson

Selecting the right vendor to support your community bank can be a daunting task. From discovery meetings to reference calls, asking the right questions and having the right information can save you from a bad long-term vendor relationship. In this session, Cal Roberson, CIO at CalTech, will equip you with the knowledge to avoid any potential pitfalls.

10:10am

Refreshment Break

10:20am

Harnessing the Power of Personal Engagement - Our Daily Contribution to a Culture of Engagement - Clint Swindall

Much has been shared about how an organization can enhance employee engagement. When you consider 70% of employees are at some level of disengagement, it's an important area of focus since research indicates that a highly engaged workforce can increase productivity, profitability, and innovation. In a nutshell, engaged employees are good for business. While leaders spend a great deal of time searching for ways to engage employees, it's easy to overlook the impact their own level of engagement can have in a world of disengaged employees. Since many employees mirror what they see from their leaders, it's no surprise that many leaders are inadvertently spreading disengagement while they're trying to enhance engagement. Personal engagement matters because every day we walk through the door of our office we are either adding to or taking away from the culture of the organization. There is no middle ground. Our personal engagement is our daily contribution to a culture of employee engagement. In this humorous and entertaining session, we'll look at how the engagement of others starts with engagement of ourselves. In the end, participants will be able to answer this one simple question: Am I helping or hurting employee engagement in my bank based on my own personal level of engagement?

11:30am

Free Time for the Afternoon!

7:00pm

Group Dinner - Gristmill River Restaurant

1287 Gruene Rd, New Braunfels, TX 78130 - Attendees and Families

* A bus will be available to take you to and from the hotel beginning at 6:30pm and returning at 9:00pm; DRESS CASUAL!

Located beneath Gruene's landmark water tower, in the ruins of an 1878 cotton gin, overlooking the Guadalupe River, the Historic Gristmill has been considered one of the most unique dining spots in Texas for nearly half a century. A rare combination of history, location and turn-of-the-century architecture create the Gristmill's legendary Texas experience!



2021 CBAO HB CONFERENCE

AGENDA

DRESS CODE FOR ALL SESSIONS AND EVENING EVENTS ARE CASUAL!
(SHORTS INCLUDED!!!).

TUESDAY, JUNE 8TH

8:30am
Networking Breakfast – *Attendees Only*

9:00am
What do You Mean Faster? - Bruce Hopkins
What's a Faster payments, Should I invest in contactless cards? What about Person to Person payments? There's so much discussion and news about innovations, new technology and building a faster payments system, but how will all if it impact your institution? This session will help you gain greater understanding of the current payments landscape, how to identify challenges and take advantage of opportunities that exist for stakeholders. We'll look at the practical application of payments in lives of our consumers and address the technologies needed and risks to consider as we race toward the future.

9:45am
Refreshment Break

9:55am
The Role of a Community Bank's Bond Portfolio - Jim Reber
This presentation will examine how a bank's bond portfolio fills the vital roles of safety, liquidity, risk management, and lastly earnings. We'll also discuss how its importance has grown in the last year.

10:40am
Refreshment Break

10:50am
Community Banks are Partnering with FinTechs More Than Ever: Here's Why You Should Too - Tom Badolato

11:30am
Conference Adjourned



HORIZON BANKERS SPEAKERS

TIM PRIEBE

Owner

T&S Online Marketing



Tim Priebe is the owner of T&S Online Marketing in Oklahoma City, and author of books including 102 Tweets, Blog a Week, and Online Marketing Mindshift.

Tim is a public speaker, author, columnist, husband, and father. He's active with several nonprofits, and has been on multiple boards over the years. He regularly assists clients with many areas of online marketing, including social media management, professional web design, SEO, blogging, and email newsletters.

CAL ROBERSON

Mentor/CIO

CalTech



Cal Roberson has worked in technology support for 25+ years; with most of those years having been with CalTech. In his current role as Mentor/CIO, he is responsible for onboarding new customers and new technicians to create strong customer relationships. Cal is instrumental in helping CalTech grow from a small local IT support company into a regional provider of IT services for financial institutions. He spearheaded the creation of the first branch office for CalTech and continues to run that office today. Cal currently lives in Denton with his wife and three boys and is an active runner, cyclist and triathlete. He also completed his first Ironman and is very proud of that accomplishment. Just ask him about it.

HORIZON BANKERS SPEAKERS

CLINT SWINDALL
President & CEO
Verbalocity, Inc.



Clint is the president and CEO of Verbalocity, Inc., a personal development company with a focus on leadership enhancement. These solutions include leadership development programs, training, speaking and general consulting.

As a professional speaker, Clint is the recipient of the Certified Speaking Professional designation, the speaking profession's international measure of professional platform competence. Just over 10% of speakers worldwide who are a part of the Global Speakers Federation hold this designation.

For more than two decades, Clint has traveled the world delivering high-content speeches and training in an entertaining and inspirational style to Fortune 500 companies, government agencies, and trade associations. His clients include 7-Eleven, American Express, BMW, Valero Energy, Enterprise Rent-a-Car, Jack in the Box, and Keller Williams.

Clint enjoys the challenge of enhancing employee engagement for his clients by delivering programs based on his three books, *Engaged Leadership: Building a Culture to Overcome Employee Disengagement*, *Living for the Weekday: What Every Employee and Boss Needs to Know about Enjoying Work and Life*, and *Tell Me Somethin' Good!: A Simple Guide to Overcoming Negativity*. He has delivered his programs throughout the United States, Canada, South America, Central America, the United Kingdom, Mexico, Bermuda, and The Bahamas. He and his wife Heather of 18 years reside just north of San Antonio in Bulverde, Texas ... the front door to the Texas Hill Country. When he's not working to enhance the leadership skills of his clients, he can be found pursuing his hobby of competition BBQ!

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BRONZE



HORIZON BANKERS SPEAKERS

BRUCE HOPKINS
Senior Vice President,
Processing
SHAZAM



As an accomplished executive in the banking industry, Bruce brings 30 years of experience leading payments, operations and technology teams at top financial services and technology firms to community financial institutions. His broad background across many aspects of the payments ecosystem uniquely positions him to create best-in-class processing services in an evolving environment.

JIM REBER
President and CEO
ICBA Securities



Jim Reber is President and CEO of ICBA Securities. He has over 30 years of financial services experience, and is a frequent speaker and lecturer at bank investment seminars and workshops. Jim also writes a monthly investment column for Independent Banker magazine. He is a member of the Board of Regents at Barret School of Banking in Memphis, TN, and served a term as Chairman. Jim is a Certified Public Accountant and a Chartered Financial Analyst, and is a graduate of Christian Brothers University, where he served on the Board of Trustees as Chairman of the Finance Committee and University Treasurer.

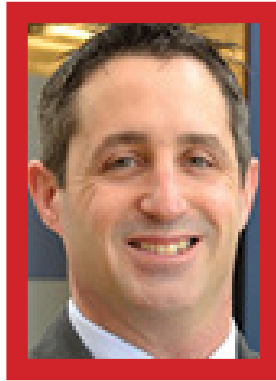
HORIZON BANKERS SPEAKERS

TOM BADOLATO

SVP, Institutional

Relationships

Bankers Healthcare Group



Tom Badolato is the SVP of Institutional Placements at Bankers Healthcare Group and has been with the company for over 15 years. His current role is developing relationships with community banks within his territories of Oklahoma, Kansas and Iowa to introduce the menu of products and services BHG has to offer. Some of these services & products include loan offerings, Patient Lending Programs, Risk Management and Digital Lending opportunities. Tom has helped grow BHG's customer base in Oklahoma to over 75 partner banks. He resides in Syracuse, NY.

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