

WBA EDUCATION & EVENTS 2024





WBA Education & Event Programs

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CONFERENCES and SPECIAL EVENTS

One or more days, based on hot topics, industry news and best practices; scheduled time for peer networking. WBA offers a specialty conference for all your bank leaders!

WBA Bank Executives Conference

February 7–9, 2024 | Kalahari Convention Center, Wisconsin Dells

Held annually, this is the premier event for Wisconsin banking leaders to come together for education and networking. Attendees can expect to join 250 or more of their banking peers to hear from national keynote speakers, attend breakout sessions to dive deeper into various areas of bank management, and connect with over 70 industry partners in the conference exhibit hall.



WBA Capitol Day

February 22, 2024 | Monona Terrace Convention Center, Madison

Join WBA staff and bankers from around the state to meet with your local representatives and state senators. Attendees will gather first to hear from WBA staff and other legislative leaders, before heading to the capitol with other bankers who also live in your district to meet with your representatives and talk and WBA's legislative priorities.

WBA Agricultural Bankers Conference

April 11–12, 2024 | Kalahari Convention Center, Wisconsin Dells

This annual conference and meeting of the WBA Agricultural Bankers Section brings together over 125 Wisconsin ag bankers for informative sessions and networking opportunities. Attendees will hear from national and local speakers over the day-and-a-half conference, and visit with a dozen or more vendors in the conference exhibit hall. Members of the WBA Agricultural Bankers Section receive a discounted conference registration fee!

WBA FinTech Showcase

April 15, 2024 | Glacier Canyon Conference Center, Wisconsin Dells

This new event is meant to bring together several fintech providers and will give them the opportunity to present a live demonstration of their product. Bankers can attend the demonstrations they'd like to see, while also spending time in the Showcase Hall to visit more with our exhibitors. Team pricing will be available for your bank.



WBA Women in Banking Conference

April 17, 2024 | Glacier Canyon Conference Center, Wisconsin Dells OR Virtual

Now is the time to invest in your women bank employees! Send your up-and-coming women bankers and top performers to this one-day conference to learn from industry experts and network with their peers. Over 225 bankers attended the conference in 2023, making it a memorable and motivational day for all attendees! Team pricing will be available for your bank.

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WBA Human Resources Conference

May 2, 2024 | Glacier Canyon Conference Center, Wisconsin Dells

Planned by members of the WBA HR Committee, for bankers, by bankers, attendees can expect to join 50+ other banking HR professionals from across the state for a day of networking, education, and idea sharing.

WBA/FDIC Bank Directors College

May 9, 2024 | DoubleTree by Hilton, Madison

This one-day summit will be facilitated by the FDIC staff to look at several hot topics and items that should be on your bank board's radar. The summit is recommended for bank management teams, beginning or experienced inside and outside directors, bank CEOs, executive officers, and bank general counsel.



WBA CFO Conference

Spring TBD | Location TBD

It's back! The WBA CFO Conference will once again return as its own one-day conference in 2024! The day will be packed with valuable educational presentations from industry thought leaders as well as time for networking with your banking peers.

WBA BSA/AML Compliance Conference

May 14–15, 2024 | Chula Vista Resort, Wisconsin Dells

This day-and-a-half conference will bring together over 80 community banking BSA/AML compliance specialists for important industry updates and educational content from several industry experts, as well as time for networking with your peers.

WBA Trust Conference

May 23, 2024 | WBA Office, Madison

Planned with assistance from the WBA Trust Banking Section, this one-day conference will focus on topics and regulations that directly impact trust and wealth management banking services in Wisconsin. This is a must-attend event for Wisconsin trust banking professionals.

WBA BOLT Summer Leadership Summit

June 13–14, 2024 | Glacier Canyon Conference Center, Wisconsin Dells

Has your bank identified your emerging leaders? Are your next gen leaders ready? BOLT (Building Our Leaders of Tomorrow) is just what your bank's emerging leaders need to grow their banking and leadership skills. Through education, networking, and advocacy, the annual BOLT Summit is a great investment in your up-and-coming bankers' careers!



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WBA Secur-I.T. Conference

September 10–11, 2024 | Wisconsin Dells

This one-and-a-half-day multi-track conference is designed for your bank's IT, security, and operations professionals. Attendees will enjoy networking with over 100 of their banking peers while also attending keynote sessions, vendor-hosted breakout sessions, peer group discussions, and dedicated time for networking. Team pricing will be available for your bank.

WBA Management Conference

September 23–24, 2024 | Radisson Conference Center, Green Bay

This conference is ideal for community banking leaders to come together for networking and education about the ever-evolving banking industry. CEOs, CFOs, CCOs, HR leaders, and other members of the bank's management team are encouraged to attend as a team to take advantage of this great networking conference, including a full exhibit hall of your partners, general session presentations, and breakout sessions for your team to pick from. Team pricing will be available for your bank.



Family-Owned and Closely Held Bank Strategic Retreat

October 2024 TBD | Madison

Presented in partnership with Godfrey & Kahn, S.C. and the Illinois Bankers Association, this retreat is designed to address the unique challenges and opportunities faced by family-owned or closely held banks. Timely educational content will be combined with plenty of networking, so that you can walk away with action items and strategies to bring back to your bank.



CONFERENCES and SPECIAL EVENTS

One or more days, based on hot topics, industry news and best practices; scheduled time for peer networking. WBA offers a specialty conference for all your bank leaders!

Directors Summit

Fall 2024 TBD | Northern or Central Wisconsin

This one-day summit will discuss key issues regarding the leadership and management of community banks from the director's perspective. The Summit is recommended for bank management teams, beginning or experienced inside and outside directors, bank CEOs, executive officers, and bank general counsel.

WBA BOLT Winter Leadership Summit

November 7, 2024 | Kalahari Convention Center, Wisconsin Dells

Has your bank identified your emerging leaders? Are your next gen leaders ready? BOLT (Building Our Leaders of Tomorrow) is just what your bank's emerging leaders need to grow their banking and leadership skills. Through education, networking, and advocacy, the one-day winter BOLT Summit is a great investment in your up-and-coming bankers' careers!

WBA FLEX: Retail & Marketing Summit (formerly known as LEAD360)

November 20–21, 2024 | Glacier Canyon Conference Center, Wisconsin Dells

This one-and-a-half-day multi-track conference is designed for your bank's marketing, retail, sales, and financial literacy professionals. Attendees will enjoy networking with over 100 of their banking peers and having dedicated time for networking, while also attending keynote sessions, role-based breakout sessions, peer group discussions, and dedicated time for networking. Team pricing will be available for your bank.



SCHOOLS and BOOT CAMPS

Focused on a particular area of banking, allowing for a deep dive into that focused area over the course of two to five days.

Loan Compliance School

March 11–15, 2024 | WBA Office, Madison OR Virtual

This school was designed to provide attendees with a fundamental overview of the various lending regulations affecting their institution, updates on current trends in compliance and the guidelines to use in interpreting federal and Wisconsin state laws, regulations and official commentary. This school includes all of the elements of the WBA Real Estate Compliance School in addition to non-real estate specific lending rules.

Real Estate Compliance School

March 13–15, 2024 | WBA Office, Madison OR Virtual

This three-day school was designed to provide attendees with a strong foundation on federal and state real estate lending laws and regulations.



Residential Mortgage Lending School

March 25–28, 2024 | WBA Office, Madison

Attendees will gain the knowledge and tools needed to be successful in the complex and highly competitive mortgage lending market. Attendees will learn from seasoned professionals and work together with their classmates on a case study.

Introduction to Commercial Lending School

April 16–18, 2024 | WBA Office, Madison

This school curriculum is designed to provide bankers with a basic understanding of the principles and concepts of commercial lending. In addition to

presentations, faculty members will facilitate case study work and group discussions to engage attendees.

School of Bank Management

April 22–26, 2024 | WBA Office, Madison

As WBA's highest-level school, this program was designed to help your team become more well-rounded community bankers, learning about all the aspects of banking "as a business." Attendees will bring back knowledge and thoughtful discussion to your bank following a full week of education and networking with other community banking leaders!



SCHOOLS and BOOT CAMPS

Focused on a particular area of banking, allowing for a deep dive into that focused area over the course of two to five days.

Personal Banker School

Spring TBD | Wausau Area

Fall TBD | WBA Office, Madison

This school has been designed to get personal bankers up to speed quickly by providing them with the techniques and knowledge they need to successfully sell, cross sell, refer and service the banking industry's ever-expanding list of financial products. Attendees will leave the school better equipped to provide your customers with exceptional product knowledge and customer service

Deposit Compliance School

August 13–15, 2024 | WBA Office, Madison OR Virtual

This three-day school was designed to provide you with a strong foundation of the various deposit regulations affecting your bank, the current trends in compliance, and the resources you need following the school. Bank retail and branch staff will benefit from this school, in addition to compliance and audit staff.

Agricultural Lending School

Late Summer 2024 TBD | WBA Office, Madison

This school was developed as an intermediate-level school. Case studies, in-class work, class discussions, and a farm visit are all elements of this school. An optional pre-school workshop will be hosted the day prior to the school starting. The optional workshop is geared towards those ag lenders and credit analysts who would like to strengthen their foundational knowledge of ag financial statements, the 6 C's of Credit, and look at some initial ratios.

Commercial Lending School

October 8–10, 2024 | WBA Office, Madison

As WBA's advanced-level commercial lending and credit school, this school builds on the knowledge of experienced lenders and credit analysts to take their skills to the next level. Faculty-led instruction, case studies, in-class work, and class discussions are all elements of this school.



SCHOOLS and BOOT CAMPS

Focused on a particular area of banking, allowing for a deep dive into that focused area over the course of two to five days.

Supervisor Boot Camp

October 21–22, 2024 | WBA Office, Madison

This two-day dynamic, interactive workshop is just what all supervisors need—both new and experienced supervisors will benefit! The program includes exploring the coaching and leadership skills that lay out a plan for your success as a highly effective supervisor. You will find this experiential training opportunity invigorating, motivating, and applicable to managing and supervising others.



Consumer Lending Boot Camp

Fall TBD 2024 | WBA Office, Madison

This program was developed to help bankers build the foundation and skills necessary to become a successful consumer lender or processor. Students will learn the process of basic lending and then put it into practice through various exercises and case studies. Students will gain increased knowledge of the steps and analysis process involved in consumer lending, an understanding of the various types of consumer loans and their loan documentation requirements, and a comprehensive understanding of the various lending rules and regulations.

Branch Manager Boot Camp

Four-part Virtual Series (Half-Day Sessions) – New series begin annually in January, May, and September.

Attendees will join other branch leaders from all around the country for this virtual series, focusing on the critical skills and expectations that need to be developed to ensure that the next-generation branch manager will exceed expectations and goals set for them. Attendees will engage in discussions, small group activities, and skills practices to ensure that ideas are shared, and learning is entertaining and adopted.

Principles of Banking – Two-Day Accelerated Course

Several spring and fall dates will be offered in locations around Wisconsin. If your bank is interested in hosting a session, please contact WBA education at WBAeducation@wisbank.com.

Recognized as the most comprehensive introduction to the banking industry for over 40 years, this course introduces fundamental banking concepts and principles, the basics of how banks operate as service providers and businesses, their obligation to operate in a safe and sound manner and manage risks, and the responsibilities of bank employees in a customer-focused financial services environment.



LEADERSHIP DEVELOPMENT



Building Exceptional Leaders Through Involvement

The WBA BOLT Section was formed in 2013 with the purpose of engaging, educating, and advancing the future leaders of the Wisconsin community banking industry. BOLT develops your bank's current and emerging leaders by connecting them with other emerging leaders in the community banking industry from around the state to create a powerful peer networking opportunity; gives members valuable leadership skill development training through our two annual summits; and encourages your emerging leaders to get involved in representing the industry through various advocacy efforts – political, legislative, and community.

Each WBA member-bank is encouraged to identify their emerging leaders and have them participate in BOLT to help them grow personally and professionally.

Education programs for your current and future leaders:

- » BOLT Summer Leadership Summit
- » BOLT Winter Leadership Summit
- » Capitol Day
- » Management Conference
- » School of Bank Management
- » Supervisor Boot Camp
- » Women in Banking Conference

Visit wisbank.com/BOLT for more information and to sign up your emerging leaders to join the BOLT Section!



WORKSHOPS and FORUMS

One-day programs focused on a specific topic or area of banking.

WBA Compliance Forum

New series starting in June 2024, second session in November 2024, third session in February 2025 | Wisconsin Dells

The annual WBA Compliance Forum membership provides Wisconsin bank compliance professionals with the information they need to stay informed in a rapidly changing environment. Each session will provide in-depth information on key compliance issues, including state-specific matters, as well as a networking opportunity with other compliance officers. Members also enjoy access to the WBA Compliance Forum Google Group for networking throughout the year.

Community Bankers for Compliance (CBC) – Four Part Membership – NOW FULLY VIRTUAL FOR 2024!

Sessions to be held in January, April, July, and October 2024

The CBC Program will provide your bank with up-to-date information on the ever-changing bank regulations, as well as guidance for structuring and maintaining your in-bank compliance program. A particular topic will be identified and covered for each individual session. This is a nationally-presented program; state-specific items will not be addressed.

Call Report Review & Update Workshop

» March 14–15, 2024 | Virtual Half-Days

Health Savings Account (HSA) Workshop

» March 6, 2024 | WBA Office, Madison OR Virtual

IRA Essentials Workshop

» Fall 2024 TBD | WBA Office, Madison OR Virtual

Security Officer Workshop

» March 20, 2024 | Glacier Canyon Conference Center, Wisconsin Dells OR Virtual

Advanced IRA Workshop

» March 5, 2024 | WBA Office, Madison OR Virtual
» Fall 2024 TBD | WBA Office, Madison OR Virtual

BSA/AML Workshop

» Fall 2024 TBD | Location TBD OR Virtual

CONNECT ONLINE PEER GROUPS

WBA Connect is a collection of banker-only peer communities designed to keep bankers connected and help one another grow. Membership in each WBA Connect group comes with access to that group's exclusive online peer-to-peer email, set up using Google Groups. Certain groups will also coordinate in-person networking meetings as desired by the group's membership.

Current WBA Connect Peer Groups:

- » Allies for DEI in Banking
- » Bank Trainers
- » Cash/Treasury Management
- » Enterprise Risk Management
- » HR & Organizational Development
- » Marketing
- » Retail Banking
- » Small Business Bankers
- » Technology & Operations



ROLE-BASED LEARNING

WBA Education offers a wide variety of training and professional development opportunities for bankers at every level within their banks. Below are the education programs and events listed in by banking roles.

BANK EXECUTIVES:

- » Bank Executives Conference
- » Capitol Day
- » CFO Conference
- » Directors Summit
- » FinTech Showcase
- » Management Conference
- » Society of Bank Executives – Membership opportunity

LEADERSHIP DEVELOPMENT:

- » BOLT Summer Leadership Summit
- » BOLT Winter Leadership Summit
- » Capitol Day
- » Management Conference
- » School of Bank Management
- » Supervisor Boot Camp
- » Women in Banking Conference

LENDING:

- » Agricultural Bankers Conference
- » Agricultural Lending School
- » Commercial Lending School
- » Consumer Lending Boot Camp
- » Introduction to Commercial Lending School
- » Management Conference
- » Residential Mortgage Lending School
- » School of Bank Management
- » Connect Peer Group: Commercial Lending
- » Connect Peer Group: Small Business Banking
- » Connect Peer Group: Cash/Treasury Management

COMPLIANCE:

- » New in 2024 – New education programs will be offered as new rules/regulations become finalized
- » BSA/AML Compliance Conference
- » BSA/AML Workshop
- » Community Bankers for Compliance (CBC)
- » Compliance Forum
- » Compliance Management School
- » Deposit Compliance School
- » Internal Audit Workshop
- » Loan Compliance School
- » Real Estate Compliance School
- » Connect Peer Group: Enterprise Risk Management



HUMAN RESOURCES:

- » Human Resources Conference
- » Management Conference
- » Connect Peer Group: HR & Organizational Development
- » Connect Peer Group: Bank Trainers

MARKETING & RETAIL BANKING:

- » Branch Manager Boot Camp
- » FLEX: Retail & Marketing Summit
- » Health Savings Account Workshop
- » IRA Essentials Workshop
- » IRAs: Advanced Workshop
- » Personal Banker School
- » Principles of Banking
- » Supervisor Boot Camp
- » Connect Peer Group: Marketing
- » Connect Peer Group: Retail Banking

OPERATIONS, TECHNOLOGY & SECURITY:

- » BSA/AML Compliance Conference
- » BSA/AML Workshop
- » Call Report Review & Update Workshop
- » FinTech Showcase
- » Secur-I.T. Conference
- » Security Officer Workshop
- » Connect Peer Group: Cash/Treasury Management
- » Connect Peer Group: Enterprise Risk Management
- » Connect Peer Group: Technology and Operations

STATE-WIDE WBA EMPLOYEE RESOURCE GROUP

WBA's DEI Employee Resource Group (ERG) is designed to be a safe space for bankers to meet virtually for one hour approximately once per month in an open-forum discussion to share feelings, concerns, and frustrations as well as positive developments related to DEI. All staff at WBA member banks are welcome to participate in the meetings as their schedules allow.

The Wisconsin Bankers Association's (WBA) mission is to promote a healthy environment for banks in Wisconsin that, in turn, focus on helping their local communities. Ensuring that a broad mix of individuals with a variety of ideas, differing viewpoints, thought processes, backgrounds, and experiences play a meaningful role in all aspects of the banking industry is critical to the success of WBA and its members. Embracing differences and promoting equity is at the foundation of WBA as an employer and as a trade association.

Similar to the banking industry we serve, WBA understands that in order to more fully accomplish our mission, and live our values, we must leverage the diverse backgrounds, skills, knowledge, and perspectives of our members, Board of Directors, vendors, and employees. WBA is passionate about fostering a culture for members and employees where everyone feels welcome, included, empowered and valued. This includes attracting and retaining a diverse workforce, and encouraging our staff to promote diversity, equity, and inclusion in all internal teams and across external relationships and services.

Visit wisbank.com/DEI for more information on available DEI resources.



ABA ONLINE TRAINING

Did you know? WBA is your local training provider for ABA online courses.

Register through WBA's website to receive member pricing on any ABA online courses, including certificate programs, facilitated online courses, self-paced courses, and live webinars.

Visit wisbank.com/ABA for more information and to search the online catalog of hundreds of online courses.

WEBINARS

WBA partners with several national bank training partners who offer regular webinars on several different topics. More than 300 webinars were offered in 2023 alone!

Visit wisbank.com/all-events to search through available upcoming webinars, or contact WBA Education at wbaeducation@wisbank.com with the particular topic/content you are looking for.



