

# WBA EDUCATION & EVENTS 2025





# 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 5–7, 2025 | The Pfister Hotel, Milwaukee

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 50 industry partners in the conference exhibit hall.



## Human Resources Conference

April 1–2, 2025 | 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 and a half of networking, education, and idea sharing.

## Agricultural Bankers Conference

April 10–11, 2025 | 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!

## Women in Banking Conference

April 23, 2025 | Glacier Canyon Conference Center, Wisconsin Dells

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. 300 bankers attended the conference in 2024, making it a memorable and motivational day for all attendees! Team pricing will be available for your bank.



## WBA Capitol Day

May 6, 2025 | 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.



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## CFO Conference

May 7, 2025 | DoubleTree, East Madison

Join your CFO banker colleagues for a day that will be packed with valuable educational presentations from industry thought leaders as well as time for networking with your banking peers.



## Directors Summit

May 13, 2025 | Stevens Point

October 16, 2025 | Glacier Canyon Conference Center, Wisconsin Dells

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.

## BSA/AML Compliance Conference

May 21–22, 2025 | 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.

## Trust Conference

May 22, 2025 | 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 WI trust banking professionals.

## BOLT Summer Leadership Summit

June 5–6, 2025 | 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 in 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!



# 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!

## Management Conference

September 10–11, 2025 | Marriott Madison West

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 several breakout sessions for your team to pick from. Team pricing will be available for your bank.



## FinTech Showcase

September 22, 2025 | Kalahari Convention Center, Wisconsin Dells

This 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.



## Secur-I.T. Conference

September 23–24, 2025 | Kalahari Convention Center, 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.



# 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!

## Family-Owned and Closely Held Bank Strategic Retreat

Fall 2025 | TBD

Presented in partnership with Godfrey & Kahn, s.c., 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.

## BOLT Winter Leadership Summit

November 5, 2025 | 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 in 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!



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

November 19–20, 2025 | 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 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.

## Supervisor Boot Camp

March 5–6, 2025 | Hilton Garden Inn, Wausau

October 28–29, 2025 | 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.

## Personal Banker School

March 19–20, 2025 | Peoples State Bank, Wausau

May 21–22, 2025 | National Exchange Bank and Trust, Fond du Lac

Fall TBD 2025 | Fall location(s) TBD

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.

If your bank is interested in hosting a session, please contact WBA education at [WBAeducation@wisbank.com](mailto:WBAeducation@wisbank.com).



## Residential Mortgage Lending School

March 24–27, 2025 | 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.

## Compliance Management Boot Camp

April 1–3, 2025 | WBA Office, Madison

This program is designed to provide bankers with the necessary tools to develop, implement, and manage a compliance program. It is geared toward bankers who have been asked to expand their role in compliance management and enhance the bank's compliance program.

## School of Bank Management

April 14–16, 2025 | 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.

## Loan Compliance School

April 14–16, 2025 | 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. A full day on Section 1071 has been added to this school for 2025.

## Essentials of Commercial Lending Boot Camp

April 23–24, 2025 | WBA Office, Madison

This school curriculum provides bankers with foundational principles for effective commercial loan underwriting and credit analysis. This two-day interactive workshop will equip bankers to analyze the “whole credit” and make evidence-based loan approval and structuring recommendations. These skills are vital in today’s community banking environment, where bankers must have the knowledge and flexibility to respond to a wide range of loan requests.

## Real Estate Compliance School

May 12–14, 2025 | WBA Office, Madison OR Virtual

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

## Deposit Compliance School

Summer/Fall 2025 TBD | 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 2025 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.



# 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.

## Commercial Lending School

Fall TBD 2025 | 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.

## Consumer Lending Boot Camp

Fall TBD 2025 | WBA Office, Madison

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

February 25–26, 2025 | National Exchange Bank and Trust, Fond du Lac

May 19–20, 2025 | WBA Office, Madison

Fall TBD 2025 | Location(s) TBD

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. *If your bank is interested in hosting a session, please contact WBA education at [WBAeducation@wisbank.com](mailto:WBAeducation@wisbank.com).*





# LEADERSHIP ACADEMY

Introducing the WBA BOLT Leadership Academy, a newly formed program bringing together a cohort of 20–25 community banking emerging leaders over a 15-month period for extensive industry and leadership education, along with several networking opportunities for the group.

## Who Should Apply?

This program has been designed for highly motivated emerging bank leaders who have a desire to grow their leadership skills and grow a trusted network of community banking peers from across the state. The selected cohort members will come from diverse business functions within the banking industry and various locations from throughout Wisconsin.

## What's the difference from just attending BOLT Summits?

In addition to attending the two statewide BOLT Summits that are offered annually, this new program will expand on BOLT's mission by allowing participants to connect with other bankers at BOLT as well as several other programs developed exclusively for the leadership academy. The mission of the academy is to build a community of future banking leaders who are committed to advancing our industry while supporting their banks in serving the financial needs of the communities that they serve.

Limited spots available – Applications for the 2025–26 BOLT Leadership Academy are due by **March 21, 2025**. Applicants are encouraged to review included education program dates to ensure they can commit to participating in all sessions.

## What's included?

Each selected member of the 2025–26 WBA BOLT Leadership Academy will begin their 15-month program in April 2025. Each member will receive a hard copy of the national best-selling book *The Ideal Team Player*, written by Patrick Lencioni. Members will also have the opportunity to attend other WBA education programs of their choice at a discounted registration rate.

### Included In-Person WBA Events:

- June 5-6, 2025 WBA BOLT Summer Leadership Summit, Wisconsin Dells
- November 5, 2025 WBA BOLT Winter Leadership Summit, Wisconsin Dells
- Spring 2026 TBD Communicate and Connect with Confidence Workshop (presented exclusively for the Leadership Academy Cohort)
- Spring 2026 TBD WBA Capitol Day, Madison
- June 11–12, 2026 WBA BOLT Summer Leadership Summit, Wisconsin Dells

### Included Virtual Training Events:

- April 2025 virtual WBA & Program Orientation
- 8-part Understanding Bank Performance series – choose to attend in May or July 2025
- May 2025 virtual Building Leader Awareness & Effectiveness Workshop
- Fall 2025 virtual The Ideal Team Player Recap Workshop
- 2-part January 2026 Virtual Leading Multi-generational Organizations Workshop



# WORKSHOPS and FORUMS

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

## WBA Compliance Forum & Membership

June 17, 2025 (Sentury World, Stevens Point) | November 4, 2025 (Glacier Canyon Conference Center, Wisconsin Dells)  
February 17, 2026 (Glacier Canyon Conference Center, 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

Virtual sessions to be held in January, April, July, and October 2025

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 13–14, 2025 | Virtual Half-Days

## IRA Essentials Workshop

- Fall 2025 TBD | WBA Office, Madison OR Virtual

## Advanced IRA Workshop

- March 4, 2025 | WBA Office, Madison OR Virtual
- Fall 2025 TBD | WBA Office, Madison OR Virtual

## Health Savings Account (HSA) Workshop

- March 5, 2025 | WBA Office, Madison OR Virtual

## Security Officer Workshop

- March 26, 2025 | Glacier Canyon Conference Center, Wisconsin Dells OR Virtual

## BSA/AML Workshop

- Fall 2025 TBD | Location TBD



# 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.

Visit [www.wisbank.com/community/wba-connect/](http://www.wisbank.com/community/wba-connect/) for more information and to join one or more of our WBA Connect email groups!

## 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
- CEO only | CFO only Network – Membership opportunity
- Society of Bank Executives – Membership opportunity
- Compliance Forum Membership
- Compliance Management Boot Camp
- Deposit Compliance School
- Internal Audit Workshop
- Legal Process Video Series
- Loan Compliance School
- Loan Documentation On-Demand Series
- Real Estate Compliance School
- Connect Peer Group: Enterprise Risk Management

## LEADERSHIP DEVELOPMENT:

- BOLT Leadership Academy
- 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
- Essentials of Commercial Lending Boot Camp
- Loan Documentation On-Demand Series
- Management Conference
- Residential Mortgage Lending School
- School of Bank Management
- Connect Peer Group: Commercial Lending
- Connect Peer Group: Small Business Banking

## COMPLIANCE:

- New in 2025 – New education programs will be offered as new rules/regulations become finalized
- Account Titling Video Series
- BSA/AML Compliance Conference
- BSA/AML Workshop
- Community Bankers for Compliance (CBC)

## HUMAN RESOURCES:

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

## MARKETING & RETAIL BANKING:

- Account Titling Video Series
- 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
- Legal Process Video Series
- 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



# 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 30+ certificate programs, 25 facilitated online courses, and more than 100 self-paces courses!

Use QR codes below and click "Member" to view the online libraries of available online courses!

## Online Certificates



## Facilitated Online Training



## Self-paced Courses



# WEBINARS

WBA partners with several national bank training partners who offer regular webinars on several different topics. More than 500 webinars were offered in 2024 alone!

## BankWebinars.com, powered by OnCourse Learning

WBA partners with OnCourse Learning to offer over 450 skill-building webinars to advance your career and stay current on the latest trending topics with our constantly growing catalog of unique webinars - taught by industry veterans. Individual webinars, on demand programs, bundled series and bank subscriptions are available.



## Community Bankers Webinar Network, powered by FinEd

WBA partners with 30 other bankers associations and the Community Bankers Webinar Network to deliver quality webinar training for bankers across the country. Visit the website to search for upcoming live webinars. You can also browse their webinar catalog to find recent webinars that are now available as on-demand content



## Graduate School of Banking at UW-Madison (GSB)

WBA is proud to serve as one of the 18 sponsoring associations for GSB. WBA members are invited to participate in the many specialty schools (see next page) and webinars that are offered throughout the year!



Visit [www.wisbank.com/all-events](http://www.wisbank.com/all-events) to search through available upcoming webinars, or contact WBA Education at [wbaeducation@wisbank.com](mailto:wbaeducation@wisbank.com) with the particular topic/content you are looking for.

# 2025 GSB SCHOOLS

## INVEST IN CAREER DEVELOPMENT!



SPONSORED BY:



### GRADUATE SCHOOL OF BANKING July 27 - August 8, 2025

This 25-month leadership development program provides the tools you need to be successful in your banking career. At GSB, you'll develop the critical thinking skills and leadership talents to manage change and motivate people by drawing on a clear understanding of all areas of financial services management.

Plus, you'll earn a Certificate of Executive Leadership from the Wisconsin School of Business in addition to a GSB diploma.



CENTER FOR  
PROFESSIONAL  
& EXECUTIVE  
DEVELOPMENT

### HUMAN RESOURCE MANAGEMENT SCHOOL April 28 - May 2, 2025

Designed for financial services HR professionals to help tie together important banking and HR issues, this school will expand your knowledge of the business of banking, human resource management and employee performance.

### FINANCIAL MANAGERS SCHOOL September 22 - 26, 2025

This school goes beyond the basics to present best practices and solutions to today's most critical financial management decisions. Designed by experienced CFOs to provide the tools you need to build a solid foundation in asset/liability management.

### BANK CYBERSECURITY SCHOOL October 13 - 17, 2025

This school will give you the practical insights to mitigate the risk of fraud. Includes an in-depth, interactive study of the latest IT security best practices, including information security law, IT security management, virtualization, infrastructure, network penetration testing, ethical web hacking, AI and mobile defense.

### STRATEGIC MARKETING PROGRAMS Details TBA

GSB's innovative marketing programs integrate critical marketing and business development strategies with the business of banking – covering key topics like marketing planning, branding, content and digital marketing, customer acquisitions, customer experience, data management, goals setting, and more, all in the context bank leadership. Watch for details on future offerings at GSB.org

### DIGITAL BANKING SCHOOL Offered Virtually Starting March 3

The first school of its kind – to help community banks grow in the digital banking space, with a focus on innovation, digital product mix, customer engagement, technology, vendor partnerships and more.

### BANK TECHNOLOGY MANAGEMENT SCHOOL April 7 - 11, 2025

Created especially for financial services IT professionals, this popular and respected program explores critical banking and technology issues. Gain an in-depth understanding of bank profitability, technology management, security and more.

FIND DETAILS AND ENROLL AT  
**GSB.ORG**



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