



THE
36th
ANNUAL
CONVENTION

September 25-28, 2010

Renaissance Worthington Hotel

Fort Worth, Texas

General Information



Location

Unless otherwise indicated, all events for the IBAT Convention will be held at the Worthington Renaissance Fort Worth Hotel. The hotel is located in Downtown Fort Worth, just 17 miles from the Dallas/Fort Worth (DFW) International Airport.

The Worthington, a Renaissance Hotel, is Fort Worth's original AAA Four-Diamond luxury hotel. Located in historic Sundance Square, the Worthington is just moments from the Fort Worth Stockyards and Museum District. The newly renovated guestrooms reflect Western elegance and unparalleled comforts, including high-speed Internet access, Marriott Plug-In technology and spacious work desks.

Registration

Register online at www.ibat.org, or return the completed registration form to IBAT at 1700 Rio Grande Street, Suite 100, Austin, Texas 78701. Checks should be made payable to IBAT. Please retain a copy for your records.

Individual tickets may be purchased for some events. Information will be available in August.

Cancellations

All cancellations must be received in writing. Cancellations received on or before September 3 will be refunded in full. Cancellations received September 4-10 will be refunded less a \$185 administrative fee per person, and all cancellations received on or after September 11 will not be refunded. (Substitutions are allowed and encouraged.)

Special Needs

Persons with disabilities who plan to attend these meetings and who may need auxiliary aids or services are requested to contact IBAT at least 14 days in advance of these meetings so that appropriate arrangements can be made.

Dress

Dress for all of the convention events will be business casual!

Hotel Reservations

Special room rates are available for convention registrants. A room block has been reserved at a discounted rate of \$184 plus applicable taxes.

IBAT's room block cut-off is **August 13, 2010**. Rate and availability cannot be guaranteed after this date. Please note that space is limited and will be available on a first-come, first-served basis.

IBAT will submit weekly rooming lists, and notification of your arrangements will be included with your convention confirmation. The hotel will not accept any direct reservations or cancellations; all reservations must be made through the IBAT office. All hotel rooms must be guaranteed with a major credit card number, and a deposit equal to the first night room rate per room will be charged to the account provided three weeks prior to arrival.

IMPORTANT: Because of the hotel's own cancellation policy, ALL room cancellations must be made in writing to the IBAT office by August 26. No cancellations will be accepted after this date; however, substitutions are allowed and encouraged. Obviously emergencies occur, and IBAT will be happy to try to re-sell the room(s) on a case by case basis...but the hotel may not be able to take them back into their inventory.

Tax Deduction

If the purpose of attending the IBAT Annual Convention is to help you maintain or improve skills relating to employment or business, expenses relating to the conference may be tax deductible according to I.R.C. Reg 1.162-5. Consult your tax advisor.

The IRS now requires a notice on all registration forms, which informs the attendee of the amount of the registration fee representing food and beverage. We estimate the food cost portion of your basic registration fee is \$451.97. Please contact your accountant or tax advisor for any tax advice.

Continuing Education Credits

Conference attendees can earn up to 13.25 hours of continuing education credit approved by the Texas CPA Society.



Sponsors

as of June 15, 2010

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Inc.
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Itinerary

Saturday, September 25

- Noon-5:00pm **23rd Annual Leadership Classic Golf Tournament** –
Texas Star Golf Course, Euless
- 5:00pm **Evening Free**

Sunday, September 26

- Noon-6:00pm **Convention Registration**
- 12:30-3:00pm **General Session**
- The Outlook for Residential and Commercial Real Estate in Texas – Dr. Mark G. Dotzour, Real Estate Center at Texas A&M University
 - ICBA Update – Camden R. Fine, Independent Community Bankers of America
 - Interest Rates and Risk: Considerations for Texas Community Banks – Edward A. Krei and Jeffrey F. Caughron, The Baker Group
- 3:00-5:00pm **Exhibits**
- 5:00-7:00pm **Reception with Exhibitors** –
sponsored by The Baker Group
- 7:00-9:30pm **Evening Free**
- 9:30-11:30pm **Songwriters' Late Show**

Monday, September 27

- 7:00am-4:00pm **Convention Registration**
- 7:00-7:30am **Devotional**
- 7:30-8:30am **Continental Breakfast**
- 8:00-8:50am **Learning Labs**
- 9:00-9:50am **Learning Labs**
- 10:00am-Noon **Exhibits**
- 12:15-2:00pm **Lunch & Learns or Networking Lunch** for all registered attendees and spouses/guests
- 2:30-4:00pm **Texas Regulators: Hot Topics and Insights on Top Issues of the Day**
- 5:30-9:30pm **22nd Annual PAC Auction** – *sponsored by SHAZAM*

Tuesday, September 28

7:00am-4:00pm **Convention Registration**

7:00-7:30am **Devotional**

7:30-8:30am **Continental Breakfast**

8:15-8:40am **Learning Labs**

8:45-9:10am **Learning Labs**

9:30am-noon **General Session**

- Tough Times, Tougher Teams: Leave the Excuses to the Other Guys – Stan Slap
- Annual Business Meeting
- Economic Overview – Robert D. McTeer Jr., National Center for Policy Analysis

12:30-2:00pm **Best of Community Banking Awards Luncheon –
*sponsored by The Baker Group***

- The Essence of Greatness – Dr. Rick Rigsby [*invited*]

2:30-3:20pm **Learning Labs**

3:30-4:20pm **Learning Labs**

4:30-6:30pm **Hospitality Suites**

6:30-9:30pm **21st Annual Texas Informal at the Reata**





General Sessions

Sunday, September 26

- The Outlook for Residential and Commercial Real Estate in Texas – Dr. Mark G. Dotzour, Real Estate Center at Texas A&M University
- ICBA Update – Camden R. Fine, Independent Community Bankers of America
- Interest Rates and Risk: Considerations for Texas Community Banks – Edward A. Krei and Jeffrey F. Caughron, The Baker Group

Monday, September 27

- Texas Regulators: Hot Topics and Insights on Top Issues of the Day

Tuesday, September 28

- Tough Times, Tougher Teams: Leave the Excuses to the Other Guys – Stan Slap
- Economic Overview – Robert D. McTeer Jr., National Center for Policy Analysis
- The Essence of Greatness – Dr. Rick Rigsby *[invited]*



Lunch & Learns

Monday, September 27

Back by popular demand! We'll offer two options:

Grab your lunch and sit in on one of four in-depth sessions covering current industry issues. Seating is limited and available on a first-come, first-served basis. Choose from:

- **How to Make Real Money with Cash Management Products** – Brad Smith and Sharon Sokol, Abound Resources
- **Is Your Bank Feeling the Pinch of Reg E Restrictions?** – Cheryl Lawson, John M. Floyd & Associates
- **Making the Grade: Do Your Directors Deserve an A+?** – Cathy Ghiglieri, Ghiglieri and Company; Jewell Hoover, Hoover & Associates, LLC
- **Bank Account Agreements – Does Your Current Version Best Protect the Bank From Certain Claims?** – William “Pat” Huttenbach, Hirsch & Westheimer, P.C.

Your second option – catch up with old friends or network with clients. IBAT will provide the lunch for all fully-registered attendees, spouses and guests not otherwise attending a Lunch & Learn.





Learning Labs

Monday, September 27

8:00-8:50am *Choose from:*

- Community Banker Best Practices in Financial Education – Mary Lange, IBAT Education Foundation
- Emerging Trends in the EFT Industry – James P. Ghiglieri, Jr., SHAZAM
- The Compensation Committee and Pay Czars: What Next? – Kathy Smith and Kelly Earls, J.D., CPA, Bank Compensation Consulting; Robert Flowers, J.D., Hunton & Williams; Jon McDowell, BKD, LLC
- Weathering the Storm: How a Strong Acquisition Strategy Can Help You Prevail – Gabriel Krajicek, BancVue

9:00-9:50am *Choose from:*

- Loan Pricing Strategies for Success – Dan Roderick, ProfitStars
- Acquisitions in Troubled Times – Charles E. Greef and Peter G. Weinstock, Hunton & Williams
- Technology Evolution – George Danforth, PULSE
- Social Networking Threats: That Friend Request Could Be Your Worst Enemy – Beau Woods, SecureWorks, Inc.

Tuesday, September 28

8:15-8:40am *Choose from:*

- A Case for Innovation: Meeting the Needs of the Next Generation – Dom Morea, First Data Corporation; Glynn Frechette, STAR Network / First Data
- Punch Your Ticket! Three Great Performances of the Extraordinary Frontline Employee – Tim Tivis, The Pinnacle Training Group
- CFO Checklist: The Now Routine for the New Normal – Chris Bledsoe, Banker's Dashboard
- New Regulation Z Requirements – Brett Schimanski, BKD, LLP

8:45-9:10am *Choose from:*

- Social Media & The Banking Industry – Melissa Kinion and Virginia Grimes, The Genesis Group
- My Slice of the Stimulus: The New Markets Tax Credits Program – Bruce Toppin, Kennedy, Toppin & Sutherland, LLP
- CARD ACT, Reg E, Now What? – Janine Kasper, EFTSource, Inc.; Jeff P. Goodsell, First National Bank Texas, Killeen
- Bank Insurance: Tips, Tools and Trends – Carol Troy and Connie Tolles, IBAT Financial Services

2:30-3:20pm *Choose from:*

- Pooled Collateral: A New Alternative for Public Funds – Steve Scurlock, Independent Bankers Association of Texas
- Get Ready, Start, Go with ATM Security! – James E. Pettitt, Diebold
- Financial Institutions at the Center: How You Can Become a Player in Mobile Payments – Rod Stambaugh, Bling Nation
- Compliance Risk Assessments: Using the Results of Your Assessment – Gary Schweers, CRCM and Annette Evans, CPA, CRCM, Padgett, Stratemann & Co. LLP

3:30-4:20pm *Choose from:*

- Trust, Selling and the Generations – Martie Woods, Deluxe
- Good Banks, Bad Banks and Everyone Else in Between – An Examination of Strategies for Both Survival and Taking Advantage of Opportunities in the Current Banking Environment – William T. Luedke IV, Sanford M. Brown and Charlotte Rasche, Bracewell & Giuliani LLP
- Increasing Your Bank's Profitability: How to Retain Profitable Customers and Enhance the Profitability of Marginal or Non-profitable Customers – Bill Armisted, FIS
- Effective Cross-Selling: What You Need to Know – David Acevedo, 360 View





Entertainment



Songwriters' Late Show

Sunday, September 26 9:30-11:30pm

You won't want to miss this IBAT tradition – a late show featuring four of the industry's finest songwriters. They'll play their number one songs and tell a few stories into the late hours of the evening in an unplugged type of format. This year we're featuring these award-winning artists: **Allen Shamblin, Dave Loggins, Casey Beathard and Mike Loudermilk.**



22nd Annual PAC Auction

Monday, September 27 5:30-9:30pm

Sponsored by **SHAZAM**

Once again the Leadership Division will host an auction to benefit the IBAT PAC. This is a fun and exciting way to help the PAC – and your chance to bid on some great items such as fishing and hunting trips, jewelry, sports memorabilia and collectibles.

The Silent Auction will take place from 5:30-7:00 p.m.; then you can grab a plate and find a seat for a very fast paced LIVE auction.



21st Annual Texas Informal

Tuesday, September 28 6:30-9:30pm

We'll top off your convention experience with an evening at the historic Reata Restaurant, featuring three levels of inside and outside dining, live music and dancing. Just one block away from the hotel, the Reata is the quintessential Fort Worth venue to relax and unwind or kick up your heels and dance the night away. It includes bustling open rooms for dining, quiet nooks for conversation, and open terraces and rooftop gathering places to listen to music and dance.





Golf Tournament

23rd Annual Leadership Classic Golf Tournament

**Saturday, September 25 1:30pm Tee Time;
Florida Scramble**

**Entry fee – \$175 for Convention registrants;
\$225 for non-registrants**

This year's tournament takes place at the Texas Star Golf Course in Euless, a 7,000 yard, par 71 course guaranteed to challenge golfers of every level. Entry fee covers your cart and green fees, commemorative golf shirt, luncheon, and beverages during play.

This tournament benefits the association's PAC and ALL checks for entries must be personal and made payable to the IBAT PAC. Corporate contributions cannot be accepted. If you would like to participate, simply check the applicable space on the registration form, and an official entry form will be mailed to you.



Spouse & Guest Activities

Registered spouses and guests are welcome to attend the following:

Sunday, September 26

- Reception with Exhibitors
- Songwriters Late Show

Monday, September 27

- Continental Breakfast
- Devotional
- Luncheon
- Auction

Tuesday, September 28

- Continental Breakfast
- Devotional
- Luncheon
- Hospitality Suites
- Texas Informal



Exhibits

as of June 15, 2010

Exhibit Hall Hours:

Sunday, September 26 - 3:00-7:00pm; Monday, September 27, 10am-noon.

Stay and Play Cash Prize Instant Win Drawings

All registered bankers are eligible to play. Each Exhibitor you visit will enter your name once for the drawings. During exhibit hall hours on Sunday and Monday, we will hold random drawings for Instant Cash Prizes...but you must be present to win!

Abound Resources
AccuSource Solutions
Advantage Health Plans Trust
Amerisource Funding
Anova Financial
The Baker Group
BancVue & First ROI
Bank Compensation Consulting, Inc.
Bank Financial Services Group
Bank On Hold
Banker's Dashboard
Bankers Healthcare Group
BCI
Bling Nation
Briggs & Veselka Co.
Calyx Software
Chandler Signs
Chubb & Son
Clark Consulting
Crescent Mortgage Company
Curtis 1000
Deluxe Financial Services
Diebold
eBank Systems, Inc.
eDominate Inc.
EFT Source, Inc.
Federal Home Loan Bank of Dallas

First American Payment Systems
First Data
FIS
The Garland Group
Gregg & Valby Mortgage Services
Harper & Pearson Company, P.C.
ICBA
Integrated Bank Technology
Intrasweep
Investment Professionals, Inc.
J. B. Lloyd & Associates, LLC
Lanvera, LTD
McCoy Myers & Associates, a CSI Company
Merchants' Choice Payment Solutions
Mortgage Services III, LLC

Nicola Banking System, Inc.
Office of the Comptroller of the Currency
Office of Thrift Supervision
Open Solutions Inc.
Percento Technologies
Plansmith Corporation
PULSE
Radian Guaranty Inc.
Schwartz & Associates
SecureWorks
SHAZAM
Subchapter S Bank Association
SWACHA
TransFirst
Travelers
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