



THE INDEPENDENT BANKERS ASSOCIATION OF TEXAS

DESTINATION ▶ IBAT

THE COMMUNITY BANKER'S ROAD MAP

THE 37TH ANNUAL CONVENTION

October 1-4, 2011 • Westin La Cantera Resort • San Antonio Texas

GENERAL INFORMATION

Location

All events for the IBAT Convention will be held at the Westin La Cantera Resort in San Antonio, Texas. If flying, the hotel is located approximately 12 miles or 15 minutes from the airport. If driving, the hotel is located adjacent to Six Flags Fiesta Texas, just past the junction of Loop 1604 and I-10, at 16641 La Cantera Parkway.

The Resort is the ultimate blend of recreation and luxury: six pools, three hot tubs, health club and spa services, tennis courts, and delightful dining.

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 9 will be refunded in full. Cancellations received September 10-15 will be refunded less a \$185 administrative fee per person, and all cancellations received on or after September 16 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!

Continuing Education Credits

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

Hotel Reservations

Special room rates are available for convention registrants. A room block has been reserved at a discounted rate of \$225 plus applicable taxes.

IBAT's room block cut-off is August 19, 2011. 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 September 6. 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 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 \$462.28. Please contact your accountant or tax advisor for any tax advice.



ITINERARY

Saturday, October 1

- 12:00-5:00pm **24th Annual Leadership Classic Golf Tournament**
Golf Club Resort Course
- 5:00pm **Evening Free**

Sunday, October 2

- 12:00-6:00pm **Convention Registration**
- 12:30-3:00pm **General Session**
- The Honorable Spencer Bachus [invited]
 - Jim MacPhee – ICBA Update
 - Erik Wahl – The Art of Vision
- 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, October 3

- 7:00am-4:00pm **Convention Registration**
- 7:00-7:30am **Devotional**
- 7:30-8:30am **Breakfast**
- 8:00-8:50am **Learning Labs**
- Overdraft Best Practices Post Guidance
 - Examiner Hot Buttons in IT Exams
 - 2011 Debit Issuer Study
 - Thriving in a Post Dodd-Frank Era
- 9:00-9:50am **Learning Labs**
- Affirmative Action Programs
 - Lending Issues
 - Legal Issues
 - Investments
- 10:00am-Noon **Exhibits**
- 12:30-2:00pm **Best of Community Banking Awards Luncheon**
sponsored by **The Baker Group**
- Featuring Evan Smith

2:00-2:45pm

Banker to Banker Resource Sharing

- Non-interest Income
- Legal Issues
- Board of Directors Issues
- Lending Issues

3:00-3:45pm

Banker to Banker Resource Sharing

- Non-interest Income
- Legal Issues
- Technology
- Training & Financial Literacy

4:00-5:00pm

Learning Labs

- Mergers & Acquisitions
- High Performance Banking
- Compliance Issues
- Investments

5:30-7:00pm

Hospitality Suites

7:00-11:30pm

23rd Annual PAC Auction and Late Night Dance



Tuesday, October 4

7:00am-2:00pm

Convention Registration

7:30-10:00am

General Session & Buffet Breakfast

- Dr. Tom Parliment
- Annual Business Meeting
- Elizabeth Warren [invited]

10:30am-Noon

Learning Labs

- Mortgage Issues
- Mobile Banking
- Search Engine Optimization and Online Account Opening
- Accounting Issues

12:00-1:30pm

Luncheon

- Featuring Connie Podesta

2:00-3:30pm

Closing General Session

- Regulator Panel



GENERAL SESSIONS

James D. MacPhee, ICBA Immediate Past Chairman and CEO of Kalamazoo County State Bank in Schoolcraft, MI, will provide us with an update from the Independent Community Bankers of America.

Erik Wahl's "The Art of Vision" is a one-of-a-kind program designed to challenge organizations to discover their untapped potential. The format is fast-paced, entertaining, and full of surprises.

Evan Smith is the CEO and editor-in-chief of The Texas Tribune, which, in its first year in operation, won two national Edward R. Murrow Awards from the Radio Television Digital News Association and a General Excellence Award from the Online News Association.

Dr. Thomas J. Parliment is noted throughout the business community for his speeches and articles covering a wide range of financial and economic issues. He focuses on strategic financial planning to help institutions gain and maintain sustainable superior earnings growth.

Connie Podesta is an International Corporate and Leadership Consultant. Her high energy, informative, and entertaining presentations have inspired more than two million people throughout the world.

In addition, we've invited two of Washington's most noteworthy insiders to address our convention: the **Honorable Spencer Bachus**, Chairman of the U.S. House Committee on Financial Services; and **Professor Elizabeth Warren**, Assistant to the President and Special Advisor to the Secretary of the Treasury on the Consumer Financial Protection Bureau.

Finally, our closing general session will feature the popular **Regulator Panel**. Hear first-hand the areas of focus, new initiatives and concerns as senior banking regulators discuss current issues and trends in their agencies.



Learning Labs

Between Washington and Austin, community bankers have been bombarded with new laws and regulations. To help you deal with this minefield of new rules, we're offering over four hours of Learning Labs on Monday and Tuesday. Experts in the community banking industry will bring you up to date on a wide range of topics including lending, legal and accounting issues, HR, mergers and acquisitions, investments and technology.

Banker to Banker Resource Sharing

Our bankers have requested this and we're delivering. On Tuesday, you can sit down with other community bankers and share ideas on non-interest income, training and financial literacy, as well as legal, compliance, technology, lending and board of directors issues.



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Longview
Travelers

as of July 8, 2011

Exhibit Hall Hours:

Sunday, October 2 - 3:00-7:00pm

Monday, October 3, 10:00am-Noon

Abound Resources	fisoc, Inc.
AccuSource Solutions	Gregg & Valby Mortgage Services
Advantage Health Plans Trust	Harper & Pearson Company, P.C.
Amerisource Funding	Integrated Bank Technology
The Baker Group	J. B. Lloyd & Associates, LLC
Banc Statements, Inc.	Jack Henry Banking
BancVue	James E. Bashaw & Co.
Bank Compensation Consulting, Inc.	Level ⁵ , LLC
Bank On Hold	Main Street Checks, Inc.
Banker's Dashboard	McCleary German Architects
Bankers Healthcare Group, Inc.	MCoUSA Bank Consulting Group
BCI	McCoy Myers & Associates, A CSI Company
Catalyst Financial Company	Merchants' Choice Payments Solutions
Catamount Funding, Inc.	Mirand Response Systems
Commerce Street Capital, LLC	Mortgage Services III, LLC A Subsidiary of First State Bank
Comptroller of the Currency	MPA Systems, Inc.
Computer Services, Inc.	Nicola Banking System, Inc.
Condley and Company Banking Services Group	Percento Technologies
Corporation Service Company	Promontory Interfinancial Network, LLC
Country Club Bank Capital Markets Group	PULSE
Davis Kinard & Co, PC	Rogers-Ford, L.C.
Dell SecureWorks	Sharp Bank System, Inc.
Diebold	SHAZAM
Equias Alliance	SWACHA
Farmer Mac	Talaris
Federal Home Loan Bank of Dallas	TransFirst
First American Payment Systems, LLC	Travelers
First Data	

ADDITIONAL ACTIVITIES

24th Annual Leadership Classic Golf Tournament

Saturday, October 1 1:30pm Tee Time; Florida Scramble
Entry Fee - \$175 for Convention registrants; \$225 for non-registrants

The Resort Course at La Cantera will be the site for our annual golf tournament. The par-72 course, designed by noted golf course architect Jay Morrish and PGA Tour professional Tom Weiskopf, offers breathtaking views, the most notable being a sheer 80-foot drop from the 7th tee to the fairway. Proceeds from the tournament will benefit the IBAT PAC. 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.

Songwriters' Late Show

Sunday, October 2 9:30-11:30pm

Our Songwriters' Late Show features perennial favorite Paul Overstreet, along with newcomers Mac Davis and Mike Reid. Check out any of these artists on the Internet and you'll find that each has written a string of hit songs. Past convention attendees can tell you that this is something you won't want to miss – listening to these guys sing their hit songs and tell stories.



23rd Annual PAC Auction and Late Night Dance

Monday, October 3 7:00-11:30pm

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. Enjoy a scrumptious dinner while bidding on some great items such as fishing and hunting trips, jewelry, sports memorabilia and collectibles.

After the auction it'll be time to party! We'll have a great dance band so you can put on your dancing shoes and boogie, or just hang out and visit with friends.

Spouse & Guest Activities

Registered spouses and guests are welcome to attend the following:

Sunday, October 2

- Reception with Exhibitors
- Songwriters Late Show

Monday, October 3

- Devotional
- Breakfast
- Shopping & Luncheon *or*
- Awards Luncheon
- Hospitality Suites
- Auction
- Late Night Dance

Tuesday, October 4

- Buffet Breakfast
- Luncheon

Spouse/Guest Shopping and Luncheon

Monday, October 3 10:30am-2:30pm

All fully-registered spouses and guests are invited to attend!

Enjoy wine and cheese while browsing through Julian Gold. The store continues to be a leader in San Antonio's fashion scene, offering everything from designer and contemporary sportswear to shoes and handbags. Featured designers include Armani, Escada, Etro, St. John, Naeem Khan, Oscar de la Renta, and Catherine Regehr, Nanette Lepore, Trina Turk, Robert Rodriguez, Milly, Red Valentino, See by Chloe and more.

After shopping you'll have a late lunch at La Fonda on Main, San Antonio's oldest Mexican restaurant (opened in 1932). La Fonda offers the best of Tex-Mex cuisine as well as an extensive selection of interior Mexican fare.

There is no additional cost for you to attend. A registration form will be provided in your convention confirmation packet.



