

# Annual Spring Summits

*A Day of Education, Networking and Recognition*

*Sponsored by the PBA Groups*



## AN INVITATION FROM THE CHAIRMAN

Feeling the chill in the air, it is difficult to believe spring is actually right around the corner! Before you know it, trees will blossom, daylight savings time will begin and the PBA Spring Summits will be underway! This time of renewal provides member institutions an opportunity to learn, laugh, network, reward and recognize, while strengthening the foundation of your Association.

The Member Services Policy Committee, chaired by William J. Wagner, President and CEO, Northwest Savings Bank, Warren, has arranged an entertaining and productive day. The afternoon will offer two educational sessions providing CPE's approved by the Pennsylvania State Board of Accountancy:

1. Whether you have or plan to adopt an Enterprise Risk Management Program (ERM), PBA affiliate members, Jack Salvetti and Nancy Schell of S. R. Snodgrass will provide a practical approach to address the key issues.

2. Is your institution maximizing opportunities to capture and retain customers through the use of alternative technologies such as; online services, social media and mobile banking? To help you assess your bank's readiness for these services, this session will present tools, best practices, challenges and customer usage statistics.

After dinner, sit back, relax and enjoy the humor of Mr. Bob Eubanks, seven-time Emmy Award winning host of "The Newlywed Game." Mr. Eubanks draws from his long personal interaction with contestants, as well as his experience as one of Hollywood's most successful entrepreneurs to refine people skills, inspire team building and enhance relationships. During his presentation, Bob will utilize outtakes from The Newlywed Game to illustrate his points.

Remember the Spring Summits are the place for recognition. Be sure to register early as PBA will recognize 40-Year bankers, PBA School Honor Students, PaBPAC contributors and member institutions celebrating charter anniversary milestones!

A special "thank you" to the numerous friends of the PBA serving as corporate sponsors. The Association extends its gratitude for your participation and financial support!

I look forward to my travels this April! I, along with the PBA Board of Directors, urge you and your management and support teams to register early.

See you in April!

Thomas M. Petro  
2011-12 PBA Chairman



**Thomas M. Petro**  
*PBA Chairman*

## FEATURED DINNER SPEAKER

### It's All About the People



Bob Eubanks, seven-time Emmy Award winning Host of the Newlywed Game is one of the most sought after motivational speakers. In addition to his hosting credentials, he has produced concerts for the Beatles, Rolling Stones, and Bob Dylan. He also helped craft the careers of Dolly Parton and Barbara Mandrell.

Eubanks focuses on enhancing people skills, team building, relationships, ethnic diversity and the use of humor as a communication skill. As one of the world's leading keynote motivational speakers, Bob works regularly with top tier corporate clients. With his years of experience in the entertainment industry, Eubanks uses his skills as a riveting storyteller to lead audiences to a common place where people skills and camaraderie immediately integrate into their personal and professional lives.

His delivery is funny, entertaining, and very motivational. One of the things he learned in his many years of television is how to extract information from people and how to get the best from those he is dealing with; skills he has been able to incorporate into his presentation. Bob brings a strong message about developing people skills and

maintaining a balance between those skills and technology. He also speaks about diversity, the elderly and humor in the workplace. During his presentation, he will utilize outtakes from the Newlywed Game to make his points.

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## LOCATIONS & TIMES

### Individual Group Times and Locations:

#### *Group 2*

**Wednesday, April 11**

*The Rivercrest Golf Club & Preserve, Oaks*  
Afternoon Educational Sessions - 12:30 p.m.  
Reception - 4:30 p.m.  
Dinner & Evening Program - 5:15 p.m.

#### *Group 3*

**Tuesday, April 17**

*The Westmoreland Club, Wilkes Barre*  
Afternoon Educational Sessions - 12:30 p.m.  
Reception - 4:30 p.m.  
Dinner & Evening Program - 5:15 p.m.

#### *Group 4*

**Tuesday, April 10**

*Williamsport Country Club, Williamsport*  
Afternoon Educational Sessions - 12:30 p.m.  
Reception - 4:30 p.m.  
Dinner & Evening Program - 5:15 p.m.

#### *Group 5*

**Monday, April 9**

*Sheraton Harrisburg-Hershey, Harrisburg*  
Afternoon Educational Sessions - 12:30 p.m.  
Reception - 4:30 p.m.  
Dinner & Evening Program - 5:15 p.m.

#### *Group 6*

**Monday, April 16**

*The Calvin House, Duncansville*  
Afternoon Educational Sessions - 12:30 p.m.  
Reception - 4:30 p.m.  
Dinner & Evening Program - 5:15 p.m.

#### *Group 8*

**Wednesday, April 18**

*Marriott Pittsburgh North at Cranberry Woods*  
Afternoon Educational Sessions - 12:30 p.m.  
Reception - 4:30 p.m.  
Dinner & Evening Program - 5:15 p.m.

Reception & Dinner Cost is \$65 at every location.  
For directions, please visit [www.pabanker.com](http://www.pabanker.com) and click on PBA Groups.

#### **For questions, contact:**

Jill Ametrano, Registrar  
(717) 255-6900  
[jillametrano@pabanker.com](mailto:jillametrano@pabanker.com)



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## AFTERNOON EDUCATIONAL SESSION

### Session I: A Practical Approach for Developing an Effective Enterprise Risk Management Program (\*4 CPEs)

\$150 per attendee

12:30 p.m. - 4:30 p.m. (Lunch provided.)

Designed for CEOs, Board Members, senior and executive bank management responsible for an ERM Program.

*\* The PBA has been accepted as a program sponsor by the Pennsylvania State Board of Accountancy.*

This seminar will demonstrate the principles and techniques for the design and implementation of an effective ERM program. The seminar will identify the specific requirements, components, success factors and even the potential pitfalls to avoid. Client case studies will be shared and practical examples used to address the key issues including:

- Revise the sources of authoritative information;
- Demonstrate through the use of case studies how an authentic ERM program works;
- Describe the technology requirements;
- Address which members of your organization should be included in the process;
- Define the role of the Board of Directors and the impact on the Corporate Governance Model;
- Explain the regulatory expectations;
- Uncover the tangible benefits of ERM; and
- Avoid the implementation pitfalls.

Whether you are considering adopting an ERM program, have a model up and running, or have years of experience with ERM, you will find the hands on, practical approach of this program to be of great value.

#### **Jack R. Salvetti, CPA**

President  
S.R. Snodgrass, A.C.



Jack is a Principal with S.R. Snodgrass, a regional accounting and consulting firm specializing in service to financial institutions. As a consultant to the financial services industry, Jack has led management and director teams in the achievement of high performance in the areas of strategy, enterprise risk management, process improvement and earnings growth. Jack has gained a national industry perspective assisting hundreds of organizations located throughout the country. He combines his background as a CPA with business experiences gained over a career that has spanned four decades, as well as his role leading Snodgrass as President and CEO.

Jack's contributions to the financial services industry include his participation on the faculties of ABA Stonier National Graduate School of Banking and the Pennsylvania Bankers Association Advanced School of Banking. He is recognized nationally as an expert to the financial services industry, has authored several articles on bank performance-related topics, and is a frequent speaker at financial management conferences.

#### **Nancy D. Schell**

Senior Vice President & Director of Consulting Services  
S.R. Snodgrass, A.C.



Nancy is a Senior Vice President with S.R. Snodgrass and is the Director of the Firm's Financial Services Consulting Group. In this role, Nancy leads the Firm's Enterprise Risk Management group, helping companies identify risk and achieve a balance of risk and reward. Nancy also directs the Strategic Planning, Organizational Design, Profit Enhancement, and Process Improvement consulting services working with financial institutions to develop effective business strategies to achieve higher levels of performance and profitability.

Prior to joining S.R. Snodgrass, Nancy was a vice president of risk management for a multibillion-dollar financial institution and led the internal audit and compliance functions. The combination of Nancy's strategic planning experience and background in risk management provides a unique view of ERM focused on risk and opportunity. Nancy has authored several articles on bank performance-related topics and is a frequent speaker at financial management conferences.

## AFTERNOON EDUCATIONAL SESSION

### Session II: Alternative Channels to Secure and Retain Customers (\*4 CPEs)

\$125 per attendee

12:30 p.m. - 4:30 p.m. (Lunch provided.)

Designed for those responsible for researching, designing and implementing new products and services.

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Online Banking...Social Media...Mobile Banking...

Is your institution maximizing opportunities to capture and retain customers through the use of alternative technologies such as; online services, social media and mobile banking? Are you supporting and reaching out to Gen X and Y? To help you assess your bank's readiness for these services, this session will present tools, best practices, challenges and customer usage statistics.

Online Banking:

- Are you open for business 24/7 accepting online applications; and
- What does it take for an online origination strategy to be successful?

Social Media:

- Current utilization of social networking sites;
- Managing risk and compliance steps to consider; and
- How to get the most value out of LinkedIn.

Mobile Banking:

- The impact of mobile devices;
- How mobile technology might complement an online strategy;
- Implementation steps to take for a successful program; and
- Pitfalls, risks, policies, procedures and processes to consider prior to deployment.



**Doug Glagola**  
Vice President  
MeridianLink, Inc.



**Colin Taggart**  
Security Consultant  
Plante Moran



**Collin Decourcy**  
Security Consultant  
Plante Moran



**Jennifer Whiteside**  
Security Consultant  
Plante Moran

## EVENING PROGRAM

### Includes:

#### Reception & Dinner

#### Recognition of:

PBA School Honor Students  
2011 PaBPAC Contributors  
40-Year Club Inductees  
Member Charter Anniversaries

#### Featured Dinner Speaker

Bob Eubanks  
"It's All About People"

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## RECOGNITION

The Pennsylvania Bankers Association will recognize four extraordinary accomplishments at the regional Spring Summits: 40-Year Club Inductees, member bank Charter Anniversary milestones, PBA School Honor Students, and PaBPAC Contributions. If in attendance at the Group Meeting, photos will be taken of each inductee during the presentation ceremony, and a press release will be provided if institutions wish to submit articles to local newspapers.

### 40-Year Club

If an employee or board member of your institution has been employed within the banking industry for 40 or more years, please complete the brochure insert. All 40-year Club inductees will be honored at their respective Spring Summit Meeting.

### Charter Anniversary

Has your institution celebrated a charter anniversary milestone since January 1, 2010? If so, please complete the brochure insert. All employees in attendance from a member institution reaching a charter anniversary in any 25-year increment (25, 50, 75, etc.) since January 1, 2010, will be recognized.

### PBA School Honor Students

At each meeting, PBA will recognize students graduating, with honors, from the PBA School of Banking, PBA Advanced School of Banking, PBA School of Commercial Lending and PBA School of Trust. If your institution employs an honor student, CEOs will be notified to determine the student's participation.

### PaBPAC Contributions

If your institution's 2011 contribution exceeded its 2010 contribution, the bank will be recognized and awarded a citation of excellence.





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### *Speaker Sponsors:*



For registration questions, please contact Jill Ametrano. Tel. (717) 255-6900



For content questions, please contact Cindy Wallett. Tel. (717) 255-6913



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For driving directions, visit [pabanker.com](http://pabanker.com) and click on "PBA Groups."



Pennsylvania Bankers Association  
3897 North Front Street • Harrisburg, PA 17110  
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