

Update

We Want to See You at Convention

We will hold our Convention "Lite" on Oct. 6-7 at the Cornhusker Marriott Hotel in Lincoln. It is with "Great Expectations" that we await the opportunity to connect with you in person!

The Convention will feature an awards luncheon on Oct. 7, where the NBA will recognize bankers celebrating milestone years of service and pay special recognition to the many bankers who have volunteered countless hours serving the NBA and their communities. Scholarship award recipients will also be recognized.

Featured Speakers:

"Discover Your Mission: 4 Lessons From A 50-State Journey"

Janine Stange, The National Anthem Girl

"The Future Economy: Opportunities For Growth"

Andrew Busch, Political Economist, Author, and Journalist

"Marketing To The Generations In Ag"

Matt Roberts, Ph.D, Expert in Ag, Commodity Markets, Energy Issues and Biofuels

"Zero Fail Mission"

Colonel (ret.) Mark Tillman, Former Commander of Air Force One on 9/11

"127 Hours: Between A Rock And A Hard Place"

Aron Ralston, New York Times Best-Selling Author

"Cybercrime, Identity Theft And Scams"

Frank Abagnale, Renowned Cybersecurity and Fraud Prevention Expert and Best-Selling Author

**Details and
Agenda**

**Hotel
Reservations**

Register



Take Action to Oppose New IRS Reporting Requirements

Bankers are encouraged to contact Nebraska's Congressional delegation to urge them to oppose new IRS reporting requirements. Congress will likely be voting on the proposal during debate on the budget reconciliation package. If enacted, banks would be required to report information on account flows on every account above a de minimis threshold of \$600. In a recent [letter](#) to Congressional committees, the American Bankers Association (ABA) noted that the new requirements raise significant data privacy and security concerns and could negatively impact the banking industry's efforts to promote financial inclusion.

[Contact Your Lawmaker](#)

CFPB Releases Section 1071 Proposal

The Consumer Financial Protection Bureau (CFPB) announced its proposal for implementing Section 1071 of the Dodd-Frank Act, which relates to credit application data collection for small businesses. The proposal would require lenders to report: the amount and type of small business credit applied for and extended; the race, ethnicity and sex of the small business owners; and several key elements of the price of the credit offered. The proposed requirements would apply to financial institutions that have originated at least 25 covered small business transactions within the previous two years.

[Learn More](#)

ABA Urges Interoperability of FedNow

The ABA submitted comments on the Federal Reserve's proposal to implement the FedNow Service. The ABA urged the Fed to ensure the new service is interoperable with the TCH Real Time Payments Network and to adopt policies consistent with current industry standards.

[Read the Letter](#)

FHFA to Require Equitable Housing Finance Plans

The Federal Housing Finance Agency (FHFA) announced new requirements for Fannie Mae and Freddie Mac to submit annual equitable housing finance plans. The plans will include objectives, metrics and action steps related to reducing racial and ethnic homeownership gaps and promoting investment and higher home values in once-redlined areas with ongoing racial or ethnic concentrations of poverty.

[Learn More](#)

FHFA Announces Affordable Housing Investments

Effective immediately, Fannie Mae and Freddie Mac will be permitted to invest up to \$850 million annually in the Low-Income Housing Tax Credit market as equity investors. FHFA also announced that it would extend from 20 to 30 days the period during which owner-occupants, public entities, and nonprofits will have exclusive ability to buy Fannie Mae and Freddie Mac real estate-owned properties before they are available for investor purchase as part of its First Look Program. These steps are part of the Biden administration's goal to "create, preserve and sell to homeowners and nonprofits nearly 100,000 additional affordable homes for homeowners and renters over the next three years, with an emphasis on the lower and middle segments of the market."

[Learn More](#)

Best Practices for Blocked Outbound Calls

The ABA and telecommunications firms recently released guidelines outlining procedures for banks to address instances when an outbound phone number is blocked or labeled as "spam" or "fraud." As part of the guidelines, participating telecommunications firms have committed to resolve at least 95% of requests to address mislabeled calling numbers and blocked calls within two business days.

[Learn More](#)

Education and Events Calendar

- Sept. 14 – Essential Teller Issues Virtual Seminar
- Sept. 20-21 – Fall IRA Essentials Virtual Workshop
- Sept. 22-23 – Fall IRA Advanced Virtual Workshop
- Oct. 6-7 – 2021 NBA Convention “Lite”
- Oct. 27-28 – Women in Banking Conference

To register and see the complete event schedule, visit the [NBA Event Calendar](#).

Resources to Combat Grandparent Scams

A recent Nebraska [news report](#) highlighted something banks see all too often – grandparent scams. Thanks to a [law](#) that went into effect last year, Nebraska banks are authorized to place a hold of up to 30 days on a transaction if they suspect a senior or vulnerable adult customer is a victim of financial exploitation. Banks may also notify family members or other third parties who can assist the senior or vulnerable adult. The NBA Government Relations team presented a training webinar on the transaction hold law. | [View the Webinar](#) (Free registration is required) | ([Slides](#))

More resources to protect your senior customers:

- [Nebraska Adult Protective Services](#)
- [ABA Foundation's Safe Banking for Seniors](#)
- [Federal Trade Commission Consumer Information](#)
- [Four Ways Banks Protect Seniors by Reducing Social Isolation](#)
- [Tips from AARP](#)

Board of Directors Roundtable Discussions

Attracting and retaining a qualified workforce is an issue that affects every Nebraska bank. At the Summer NBA Board of Directors' meeting, members discussed issues related to the banking workforce. Topics covered included employee appearance issues, such as visible tattoos or piercings; diversity, equity and inclusion; and employee use of social media during work hours. Many banks are reevaluating their policies in these areas due to employee retention. There is no one-size-fits-all solution, but there are resources to help guide your bank's discussions around these emerging issues:

- [ABA Diversity, Equity and Inclusion Resources](#)
- [Society of Human Resource Management Managing Employee Dress and Appearance Toolkit](#)

Banks Invited to UNK Career Fair

The University of Nebraska at Kearney (UNK) invites Nebraska banks to attend the Career and Internship Fair on Oct. 5. The UNK [College of Business & Technology Career Center](#) is reserving a special section for banks at the fair. Don't miss your chance to connect with students seeking internships and/or full-time employment!

[Learn More and Register](#)

Webinar: Banking & Cannabis

A free webinar on Tuesday, Sept. 21 at 1 p.m. CST will cover issues related to lending to the cannabis industry. The webinar will include banker perspectives on offering cannabis banking services and address FinCEN guidance on both deposits and lending, electronic payment systems, and legislative or regulatory changes that would promote bank participation in the cannabis industry.

[Learn More and Register](#)

Review Alliance

Did you know that the NMLSR ID for the creditor, mortgage broker, and the individual loan officer of the creditor must be disclosed on the Contact Information Table on the Closing Disclosure?

- If any of the above have not been assigned an NMLSR ID the license number or other unique identifier shall be required.
- The abbreviation for the state of the applicable jurisdiction or regulatory body should be listed BEFORE the word 'license' in the label.

Review Alliance is an independent group of compliance specialists offering banks deep-dive audits of their existing transactions, recommendations about program enhancements or guidance on future safety and soundness. In 2020, the NBA added Virtual Compliance Officer (VCO) to its compliance offerings. VCO is a new shared service model using bank-dedicated compliance officers perfect for monitoring and guiding your bank remotely. To learn how to put them to work for your bank, contact Jennifer Heaton at the NBA at 402-474-1555 or jennifer.heaton@nebankers.org.

Compliance Alliance

Q: We would like to have a giveaway contest but are concerned with the requirements under the Bank Lottery Rule. What should we consider?

A: Under the Bank Lottery Rule, with the exception of a savings raffle, any advance of money or credit by three or more persons for the possibility to win more than the amounts contributed generally results in a prohibited lottery. Below are several practices that are commonly accepted to not run afoul of this requirement.

The contest should be open to everyone, with no account needed to participate, offer multiple ways to enter and mention that IRS reporting may apply. The official rules should have a free alternative written entry method to enter for non-customers is sometimes known as the "sweepstakes workaround," which is common for giveaways. By offering a written entry alternative, a case can be made that there truly is no "money or credit" being advanced to the bank since an entrant potentially can mail in their entry and still be given a fair/equal shot at winning. While admittedly not a best practice, from what C/A has seen, it appears to be considered by auditors and regulators as compliant with both UDAAP and the anti-lottery statutes.

In addition to the free alternative method of entry, the bank should include the following information in the official rules for that promotion, as applicable:

- Geographic area and/or who is eligible to participate
- Opening date and scheduled termination date
- Complete name and address of the sponsor and promoter of the contest
- Number of prizes, the accurate description of each prize, the retail value of each prize and the odds of winning
- Whether all prizes offered will be awarded and how the prizes will be awarded
- Manner of selection of winners and when a determination of winners will be made
- Permission to use
- Where and when a list of winners can be obtained
- IRS reporting may apply

[Live Demo on Tuesday, Sept. 14, 10:00 a.m. CST](#) | [Live Demo on Thursday, Sept. 16, 1:00 p.m. CST](#)

Compliance Alliance offers a comprehensive suite of compliance management solutions. To learn how to put them to work for your bank, call (888) 353-3933 or email info@compliancealliance.com and ask for our membership team.

Essential Teller Issues 2021

**VIRTUAL
Offering**



Essential Teller Issues is rated the most dynamic teller training experience in the country. You will want all your tellers to take part in this high impact seminar. The program zeroes in on six modules that remind your tellers of the importance of what they do, how they do it, what they say, and how they deliver customer service. Essential Teller Issues is an information-packed, attention grabbing fast-paced program. InterAction Training has been providing this program for over 30 years and consistently receives rave reviews. Each participant will leave the program with a renewed commitment to excel on the job and the newest edition of the teller training manual that serves as a guide to the program.

September 14, 2021

1:00 – 3:00 p.m. or 5:00 – 7:00 p.m.

Topics To Be Covered

Professional Maturity

- Gain Flexibility
- Manage Your Image
- What You Say, How You Say It
- Reputation
- Manage Your Emotions
- Confidentiality
- Courtesy, Kindness and Professionalism

- Dissecting Less-Cash Deposits
- Fraudulent Schemes & Popular Scams

Provide Extraordinary Service

- Make Their Day
- What the Customer Wants
- Effective Communication
- Five Habits of Highly Effective Tellers

Follow Procedure

- Handle Cash Like a Pro
- See to the Details
- Robbery Preparedness
- Maintain Vigilant Compliance

Ace Cross-Selling & Referrals

- Product Knowledge Proficiency
- Be Inquisitive, Engaging and Prepared
- Spot Opportunities; Start Conversations
- Suggest Solutions; Share Information

Scrutinize Transactions

- Verification Concerns
- Check Cashing Guidelines
- Identification Rationale
- Examining Endorsements

Master the Balancing Act

- Ten Things You Must Do
- Six Things You Never Do
- Avoid Outages and Interruptions
- Eliminate Transpositions

Who Should Attend

Everyone who works a teller window including part-time, sometimes or all the time tellers plus teller supervisors, branch managers and those responsible for training tellers.

About the Speaker

Vicki Kraai's 25+ years of financial services experience started at the family bank in rural Nebraska, serving as a teller and eventually becoming CEO. Her many years of banking include credit card lending experience where she was a member of the management team that launched the Cabela's credit card program. She has a passion for developing people for success in the financial services industry. Attendee's value Vicki's highly engaging "been there, done that" approach to all facets of her training and speaking engagements. Vicki was named CEO of InterAction Training in 2020.



Registration and Pricing Information

Check here for the MEMBER BANK ALL-ACCESS PASS: \$500 (Need a main contact/registrant)

Member: \$125 (first person)
\$ 75 (each add'l)

Non-Member: \$225 (per person)

Approximately 2 days prior to the program, you will receive a link to the online presentation.

Notice is required for all substitutions/cancellations. If the cancellation request is received by the NBA Education Center by September 7, 2021, the full fee will be refunded. After that date, the refund is subject to a 50% cancellation fee per registrant. Substitutions are welcomed.

(Please register online or use the form below)

233 South 13th Street, Suite 700
Lincoln, Nebraska 68508
Phone: (402) 474-1555
Education Center Fax: (402) 474-2148
www.nebankers.org



07/28/2021



Essential Teller Issues

2021

VIRTUAL Offering

September 14, 2021

1:00-3:00 p.m. or 5:00-7:00 p.m.

Financial Institution: _____

Bank / Branch Address: _____

City/Town: _____ Zip: _____

Phone# (_____) _____

Check here for the MEMBER BANK ALL-ACCESS PASS: \$500 (Need a main contact/registrant)

Member: \$125 (first person)/\$75 (each add'l)

Non-Member: \$225 (per person)

Please register the following:			Email Address	Reg Fee	Please choose your Session	
FIRST NAME	MI	LAST NAME			1:00–3:00 pm	5:00–7:00 pm
				\$125		
				\$75		
				\$75		
				\$75		
				\$75		
				\$75		

ONLINE YOU MUST LOGIN TO RECEIVE MEMBER DISCOUNTED PRICING!

TOTAL DUE \$ _____

Four Ways to Register:

FAX: (402) 474-2148

MAIL: NBA Education Center,
PO Box 80008, Lincoln, NE 68501

PHONE: (402) 474-1555

WEBSITE:

www.nebankers.org

→ Education →

Event Calendar

Payment Choice (check one):

☐ MasterCard ☐ VISA ☐ Discover ☐ American Exp.

Cardholder Name: _____

Card Number: _____ CVV: _____

Exp. Date: _____ Signature: _____

2021 Fall IRA

Workshops – Essentials and Advanced



**VIRTUAL
Offering**

IRA Essentials – September 20 & 21, 2021 – 2 parts

(9:00am-12:00pm both days)

IRA Essentials gives attendees a solid foundation of IRA knowledge. Exercises are included throughout the day to help participants apply information to job-related situations. Attendees will leave this session able to work with IRA owners and process basic IRA transactions with confidence. This is a beginner's session; no previous IRA knowledge is assumed. Attendees should bring a hand-held calculator.

Topics to be discussed:

Introduction and Establishing IRAs

- Identify the tax advantages of Traditional and Roth IRAs
- Summarize the IRA opening document requirements
- Explain the difference between primary and contingent beneficiaries

IRA Funding

- Compare and contrast Traditional and Roth IRA eligibility requirements
- Explain the regular contribution limit
- Distinguish the regular contribution deadline
- State the rules for prior-year contributions
- Communicate the regular contribution reporting deadlines

IRA Distributions

- Identify federal income tax withholding requirements
- Recognize the exceptions to the early distribution penalty tax
- Summarize the tax consequences of Traditional and Roth IRA distributions
- Define a required minimum distribution and the required beginning date
- Communicate the distribution reporting deadlines

IRA Portability

- Differentiate between a rollover and a transfer
- Recognize rollovers between IRAs and employer-sponsored retirement plans

Who Should Attend?

You should attend this workshop if you need to learn the basics of Traditional and Roth IRAs, or want an updated, general refresher on IRA rules.

Advanced IRAs – September 22 & 23, 2021 – 2 parts

(9:00am-12:00pm both days)

Advanced IRAs builds on the attendees' knowledge of IRA basics to address some of the more complex IRA issues their financial organizations may handle. This is an advanced session; previous IRA knowledge is assumed. The instructor uses real-world exercises to help participants apply information to job-related situations.

Topics to be discussed:

IRA Update

- Explain recent changes affecting IRA owners
- Recognize how recent changes may affect your financial organization

Advanced Portability

- Summarize the restrictions on the movement between IRAs
- Describe a conversion
- Explain the effect of withholding on a conversion
- Recognize the options available when moving from an employer-sponsored retirement plan to an IRA
- Explain the result of violating the portability and conversion restrictions

Beneficiary Options

- Describe beneficiary distribution options when an IRA owner died before January 1, 2020, or dies on or after January 1, 2020
- Recognize the differences for the various beneficiary types
- Explain beneficiary payment deadlines

Required Minimum Distributions

- Calculate a required minimum distribution (RMD)
- Discuss the RMD rules and reporting requirements

You should attend this workshop if you:

- are an IRA administrator, personal banker, or member services personnel who has a working knowledge of basic IRA operations and wishes to expand your expertise and provide enhanced customer service;
- are a financial professional who recognizes that IRAs play an integral role in retirement planning;
- are a compliance specialist with procedural oversight of IRA policies and practices; or
- support personnel responsible for promotional materials that describe the services provided by your financial organization.

Registration Information

Member Fee: \$225.00 – IRA Essentials \$225.00 – Advanced IRAs
\$420.00 – Both Workshops (Only applies to same person at each workshop to receive the discount)

Non-Member: \$675.00 per person / per workshop

Registrations received after 09/14/21, will be an additional \$25 and are subject to space availability.

Approximately 2 days prior to the program, you will receive a link to the online presentation.

Notice is required for all substitutions/cancellations. If the cancellation request is received by the NBA Education Center by September 14, 2021, the full fee will be refunded. After that date, the refund is subject to a 50% cancellation fee per registrant. Substitutions are welcomed.

(Please register online or use the form below)

233 South 13th Street, Suite 700
Lincoln, Nebraska 68508
Phone: (402) 474-1555
Education Center Fax: (402) 474-2148
www.nebankers.org



1-07/28/2021



Fall IRA Virtual Workshops

September 20 & 21, 22 & 23, 2021

Financial Institution: _____

Bank / Branch Address: _____

City/Town: _____ Zip: _____

Phone# (_____) _____

Member Fee: \$225.00 – IRA Essentials \$225.00 – Advanced IRAs
\$420.00 – Both Workshops (Only applies to same person at each workshop to receive the discount)

Non-Member: \$675.00 per person / per workshop

Registrations received after 09/14/21, will be an additional \$25 and are subject to space availability.

Please register the following individual(s):		Email Address	SEPT 20 & 21 IRA Essentials \$225 p/p	SEPT 22 & 23 Advanced IRAs \$225 p/p	BOTH Essentials & Advanced \$420 p/p
FIRST NAME	LAST NAME		Non-Member: \$675	Non-Member: \$675	Non-Member: n/a

ONLINE YOU MUST LOGIN TO RECEIVE MEMBER DISCOUNTED PRICING!

TOTAL DUE \$ _____

Four Ways to Register:

- FAX: (402) 474-2148
 MAIL: NBA Education Center,
PO Box 80008, Lincoln, NE 68501
 PHONE: (402) 474-1555

WEBSITE:
www.nebankers.org
→ Education →
Event Calendar

Payment Choice (check one):

☐ MasterCard ☐ VISA ☐ Discover ☐ American Exp.

Cardholder Name: _____

Card Number: _____ CVV: _____

Exp. Date: _____ Signature: _____

GREAT
EXPECTA
ATIONS

#BanksBackNE

2021 CONVENTION “Lite”

October 6 - 7 ● Cornhusker Marriott Hotel - Lincoln

SPEAKERS

Janine Stange, *The National Anthem Girl*

“Discover Your Mission: 4 Lessons From a 50-State Journey”

Comfort zones are not that comfortable, and fears are not that scary. What's scary? Not moving in spite of them. Janine candidly shares the shifts in her thinking and habits that led her to abandon comfort zones that she occupied for over a decade. Those actions led her on a life-changing 50-state mission that demanded self-motivation, focus, creativity, balance, and follow through.



Andrew Busch, *Political Economist, Author, and Journalist*

“The Future Economy: Opportunities for Growth”

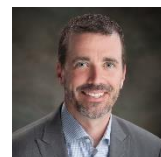
The world is going to see more economic change in the next 5 years than we have seen in the last 100 years. 2021 will be transformational as trends super-charged by the pandemic fully exert themselves on the economy. AI, robots, Zoom, ESG and Bitcoin are just a few of the extraordinary tools being leveraged right now to help business overcome, adapt and thrive.



Matt Roberts, Ph.D., *Expert in Ag, Commodity Markets, Energy Issues and Biofuels*

“Marketing to the Generations in Ag”

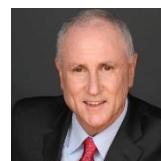
Agriculture is the only place where you can be in your late 40's and still considered 'young' but that is the demographics of farmers in the 21st century. As we move into the 3rd decade, we are seeing an increasingly rapid transition of farms to GenX and more and more startup farms run by Millennials



Colonel (ret.) Mark Tillman, *Former Commander of Air Force One on 9/11*

“Zero Fail Mission”

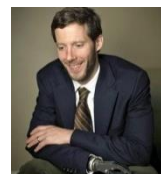
Chosen as the nation's 12th Presidential pilot, Colonel (ret) Mark W. Tillman served as pilot and commander of Air Force One from 2001-2009. Col. Tillman was at the controls of Air Force One through numerous national events. Most notably, he protected the President on September 11, 2001 by keeping him out of harms way and connecting the flying oval office to the nation's first responders.



Aron Ralston, *New York Times Best-Selling Author*

“127 Hours: Between a Rock and a Hard Place”

"There is no force more powerful than the will to live," explains Aron Ralston, who faced an unimaginable challenge with his life-or-death decision. An ordinary man who was pushed to the extreme, he demonstrates the human capacity for the extraordinary, proving anyone can survive the most grueling circumstances. A talented storyteller, Ralston recounts his ordeal, shedding new light on the meaning of sacrifice, and on what is truly important.



Frank Abagnale, *Renowned Cybersecurity and Fraud Prevention Expert and Best-Selling Author*

“Cybercrime, Identity Theft and Scams”

Frank Abagnale's transformation from one of the world's most notorious con men to a highly sought-after international cyber security consultant is truly fascinating. He tells audiences the real-life stories that inspired his book and Steven Spielberg's film, Catch Me If You Can, and the lessons he's learned working with the FBI.



AGENDA

WEDNESDAY, OCTOBER 6

10:00 am *(limited spots available)*

NBA Convention Golf Outing

Wilderness Ridge Country Club

6:30 pm

Reception and Dinner for the NBA Board of Directors, NBA Past Chairmen's Club, NBA Leadership Classes of 2020 & 2022, NBISCO Board of Directors, and VEBA Board of Trustees

THURSDAY, OCTOBER 7

7:00 am

NBA Registration Desk Open

7:30 – 8:15 am *(Trade Show open 7:30 am. – 6:00 pm)*

NBA Trade Show Continental Breakfast with Networking Opportunities

8:30 am

Annual Convention Opening Ceremony & NBA Chairman's Remarks

Chris Hove, NBA Chairman (2020)

Nebraska Bank of Commerce, Lincoln

8:35 – 9:35 am

National Anthem & Presentation

"Discover Your Mission: 4 Lessons From a 50-State Journey"

Janine Stange

9:35 – 10:25 am

"The Future Economy: Opportunities for Growth"

Andrew Busch

10:25 – 11:15 am

"Marketing to the Generations in Ag"

Matt Roberts, Ph.D.

11:15 am – 11:45 am

TRADE SHOW BREAK

11:45 am

Awards Luncheon

Join us as we recognize those bankers celebrating 50 years of service to the financial industry and banks celebrating milestone years of service to their communities. We will also pay special recognition to the many bankers who have volunteered countless hours in serving the NBA and their communities, as well as scholarship award recipients.

1:30 – 2:15 pm

"Zero Fail Mission"

Colonel (ret.) Mark Tillman

2:30 – 3:30 pm

"127 Hours: Between a Rock and a Hard Place"

Aron Ralston

3:30 – 4:30 pm

"Cybercrime, Identity Theft and Scams"

Frank Abagnale

4:30 – 6:00 pm

NBA Correspondent Banks' Reception & NBA State BankPAC Silent Auction

6:30 p.m.

NBA Chairman's Banquet

Kirk Riley, NBA Chairman (2021)

Waypoint Bank, Cozad

9:00 p.m.

Entertainment by,

Divas Through the Decades is a musical tribute to some of the most influential female vocalists in American pop music, featuring songs from the 40's, through today's current hits! This show will feature music made famous by various Divas including Tina Turner, Diana Ross and the Supremes, Celine Dion, Aretha Franklin, Gloria Estefan, Madonna, Beyonce, Shania Twain, Taylor Swift, Carrie Underwood, and many more!



SPONSORS

Diamond

NBISCO (Nebraska Bankers Insurance & Services Co.)

Platinum

Bankers' Bank of the West
Bell Bank

KBA/NBA Schools of Banking

Correspondent Reception

Cornerstone Bank

First National Bank of Omaha

Gold

Fiserv

Midwest Independent BankersBank

Silver

BlueCross BlueShield of Nebraska
Cornerstone Bank
FHLBank Topeka

Five Nines
United Bankers' Bank

Bronze

BKD
BOK Financial Solutions

CivITas Bank Solutions, A Bankers' Bank of the
West Bancorp Company
Wellness Partners

EXHIBITORS

Bankers' Bank of the West
Bankers Healthcare Group
Complete Compliance Inc.
Compliance Alliance
Data Business Equipment Inc.
DataVizion LLC
Federal Protection Inc.
Federal Reserve Bank of
Chicago

Graduate School of Banking -
Wisconsin
Graduate School of Banking at
Colorado
Intact Insurance Financial
Services
Money Handling Machines Inc.
NFP Executive Benefits
NuSource Financial LLC
Office of the Comptroller of the
Currency
PMA Funding

Rochester Armored Car Co.
Single Source Architects and
Master Builders
Travelers
United Bankers' Bank
Vantage Point Solutions
Wellness Partners
West Gate Bank

as of 08/17/2021

INFORMATION



To register for the convention, please complete the enclosed Registration Form. Please type or print the full name and nickname for each registrant along with the financial institution/firm name and address. For full registrants, please indicate on the Registration Form in the columns provided the meal functions each registrant plans to attend to help the NBA in determining actual counts for the meal functions.

Early Bird Registration (before September 23, 2021)

Full Registration:

Banker.....	\$405.00*
Associate Member.....	\$405.00*
Wednesday Golf Outing for Members	\$125.00
Accompanying Spouse/Guest	\$205.00*
Non-Member	\$1,215.00*

* Includes admission to all convention events including sessions, reception, meal functions, and entertainment.

Spouse/Guest of Full Registrants Options:

Trade Show Continental Breakfast <u>Only</u>	\$25.00
Awards Luncheon & Guest Speaker <u>Only</u>	\$55.00
Reception/Banquet/Entertainment <u>Only</u>	\$125.00

Non-members must add \$50 to the continental breakfast, \$110 to the awards luncheon, \$250 to reception/banquet/entertainment only, as shown above.

Special note: If you need any special assistance at the convention, please contact the NBA Education Center to make arrangements.

Regular Registration / Cancellation Policy

After September 23, 2021, add \$25 to each registration fee. Substitutions are allowed, at no additional cost. Notice is required for all substitutions/cancellations. If the request is received by the NBA Education Center by September 23, 2021, the full fee will be refunded. After that date the refund is subject to a 50% cancellation fee per registrant.

Convention Badges

Registrants may pick up their registration packets at the NBA Registration Desk at the Cornhusker Marriott Hotel, Lincoln. They will not be mailed in advance. Name badges will be required for admission to all NBA events.

REGISTRATION DESK WILL BE OPEN:

Thursday, October 7 7:00 a.m. - 6:30 p.m.

Hotel Accommodations

A room block has been reserved at the Cornhusker Marriott Hotel, Lincoln for the convention. **Please use the online link below** to make your hotel reservations, or you may call the Cornhusker Marriott Hotel, Lincoln directly at (402) 474-7474. When calling, please indicate you are with the NBA room block to receive the group/corporate rate. The room block expires **Wednesday, September 15, 2021.**

Cornhusker Marriott Hotel | Lincoln

333 South 13th Street, Lincoln, NE 68508 | 402-474-7474

Room Rate

Standard King or	
Double.....	\$109.00

Check-in is at 4:00 p.m.

Check-out is at 11:00 a.m.

Register online more quickly, accurately, and securely! <http://bit.ly/NBA-Hotel>

PAST CHAIRMEN

1890 - E.K. Valentine, West Point
 1892 - C.F. Bentley, Grand Island
 1894 - C.E. Adams, Superior
 1900 - Henry W. Yates, Omaha
 1901 - George W. Post, York
 1902 - Silas Henry Burnham, Lincoln
 1903 - J.T. Trenery, Pawnee City
 1904 - J.T. Trenery, Pawnee City
 1905 - L.B. Howey, Beatrice
 1906 - Philip L. Hall, Lincoln
 1907 - J.P.A. Black, Hastings
 1908 - Charles E. Burnham, Norfolk
 1909 - J.W. Welpton, Ogallala
 1910 - George N. Seymour, Elgin
 1911 - Frank McGiverin, Fremont
 1912 - George F. Sawyer, Western
 1913 - John R. Cain, Jr., Stella
 1914 - Jesse C. McNish, Wisner
 1915 - Thomas Murray, Dunbar
 1916 - Dan Morris, Kearney
 1917 - W.S. Weston, Hartington
 1918 - No Convention
 1919 - H.K. Frantz, Eagle
 1920 - John M. Flannigan, Stuart
 1921 - Charles H. Randall, Randolph
 1922 - Dan J. Riley, Dawson
 1923 - C.A. Minick, Crawford
 1924 - Harold H. McLucas, Fairbury
 1925 - I.R. Alter, Grand Island
 1926 - Clarence G. Bliss, Elm Creek
 1926 - E.C. Davenport, Valentine
 1927 - Charles A. Smith, Tilden
 1928 - Philip L. Hall, Jr., Greenwood
 1929 - A.N. Mathers, Gering
 1930 - J.G. Lowe, Kearney
 1931 - Edwin N. Van Horne, Lincoln
 1932 - R.H. Barber, Paxton
 1933 - Emil E. Placek, Wahoo
 1934 - Otto Kotouc, Sr., Humboldt
 1935 - J.M. Sorensen, Fremont
 1936 - Henry A. Schneider, Plattsmouth
 1937 - A.J. Jorgenson, Sidney
 1938 - E.S. Holcomb, Broken Bow

1939 - Clyde C. Neumann, Oakland
 1940 - Carl D. Ganz, Alvo
 1941 - O.A. Riley, Hastings
 1942 - Robert F. Clarke, Papillion
 1943 - J. Dale Milliken, Fremont
 1943 - Robert I. Stout, Tekamah
 1944 - Edgar McBride, Blue Hill
 1945 - Victor E. Dolpher, David City
 1946 - Glen T. Gibson, Gibbon
 1947 - John O. Peck, Columbus
 1948 - James R. Kenner, Sr., Hebron
 1949 - W.H. Pierce, Shelby
 1950 - Earl H. Wilkins, Geneva
 1951 - William N. Mitten, Fremont
 1952 - William F. Wenke, Pender
 1953 - W. Horton Munger, North Platte
 1954 - Edward Huwaldt, Grand Island
 1954 - Joseph V. Johnson, Tecumseh
 1955 - H.L. Gerhart, Newman Grove
 1956 - Fred H. Bruning, Bruning
 1957 - Henry D. Kosman, Scottsbluff
 1958 - Harold E. Roe, Bennington
 1959 - Everett M. Black, Fullerton
 1960 - Minor P. Baird, Superior
 1961 - Bernard D. Berkheimer, Gordon
 1962 - Lyman M. Stuckey, Lexington
 1964 - Norbert T. Tiemann, Wausa
 1965 - William W. Cook, Sr., Beatrice
 1966 - Thomas J. Aron, Crete
 1967 - Marion R. Morgan, Elwood
 1968 - Henry Gramann, Jr., Adams
 1969 - Adon Jeffrey, Wayne
 1970 - Harold L. McKibbin, Gering
 1971 - John W. Cattle, Sr., Seward
 1972 - Roland E. Emmett, Arapahoe
 1973 - F. Willard Jackman, Grant
 1974 - Richard E. Adkins, Osmond
 1975 - Robert E. Burkley, Fairbury
 1976 - James I. Black, Pierce
 1977 - Harold E. Larmon, McCook
 1978 - Karl E. Dickinson, Lincoln
 1979 - James W. McBride, Aurora
 1980 - Jerry E. Roe, Bennington

1981 - William W. Cook, Jr., Beatrice
 1982 - Harold P. Stuckey, Lexington
 1983 - Don G. Johnson, Pilger
 1984 - Andrew C. Hove, Jr., Minden
 1985 - Mel Adams, Ogallala
 1986 - C.G. Holthus, York
 1987 - Donald E. Blaha, Ord
 1988 - Harley D. Bergmeyer, Wilber
 1989 - James F. Nissen, Lincoln
 1989 - William Brandt (*Honorary*), Unadilla
 1990 - Samuel P. Baird, Superior
 1991 - Lawrence Comine, Jr., Omaha
 1992 - Rodney P. Vandeberg, Falls City
 1993 - Alice M. Dittman, Lincoln
 1994 - William W. Marshall, III, Grand Island
 1995 - Dale E. Pohlmann, Ravenna
 1996 - Arvon Marcotte, Nebraska City
 1997 - Philip M. Burns, West Point
 1998 - Dennis R. Utter, Kenesaw
 1999 - Richard E. Adkins, Jr., Laurel
 2000 - Thomas H. Olson, Lisco
 2001 - Leslie R. Andersen, Bennington
 2002 - Michael J. Nelson, Kimball
 2003 - Matthew H. Williams, Gothenburg
 2004 - Thomas E. Wolf, North Bend
 2005 - Mark A. Sutko, Kearney
 2006 - Catherine M. Morrissey, Lincoln
 2007 - Ronald D. Kranz, Fremont
 2008 - Jeffrey W. Krejci, Lincoln
 2009 - Michael B. Jacobson, North Platte
 2010 - Larry D. Marik, Columbus
 2011 - Kendell G. Holthus, York
 2012 - Clark D. Lehr, Columbus
 2012 - George G. Beattie (*Honorary*), Lincoln
 2013 - John P. Stinner, Gering
 2014 - Craig G. Brewster, Butte
 2015 - Michael Pate, Omaha
 2016 - Jerry Catlett, Bruning
 2017 - Kristie K. Holoch, York
 2018 - David P. Dannehl, Loomis
 2019 - Alan D. Emshoff, Exeter
 2020 - P. Christian Hove, Lincoln
 2021 - Kirk R. Riley, Cozad

233 South 13th Street, Suite 700
 Lincoln, Nebraska 68508
 Phone: (402) 474-1555
 Education Center Fax: (402) 474-2148
www.nebankers.org

NBA Nebraska Bankers Association

Extraordinary Service for Extraordinary Members

NBA REGISTRATION FORM

**Nebraska Bankers Association's
2021 Convention "Lite"**

**October 6 – 7, 2021
Cornhusker Marriott Hotel, Lincoln**

(Please type or print)

Bank/Company: _____

Address: _____

City/State/Zip: _____

Phone: _____

Main Contact: _____

Email: _____

Full Registrants:

Banker \$405.00
Associate Member \$405.00
GOLF OUTING (must be a full registrant) \$125.00
Accompanying Spouse/Guest \$205.00
Non-Member \$1,215.00

Registration Options

for Spouse/Guest of Full Registrants:

Trade Show Continental Breakfast Only
(No General Sessions) \$25.00
Awards Luncheon Only (No General Sessions) \$55.00
Reception/Banquet/Entertainment Only \$125.00

Non-members must add \$50 to Thursday Breakfast, \$110 to the Awards Luncheon, and \$250 to the Reception/Banquet/Entertainment Only, as shown above.

Regular Registration / Cancellation Policy: After September 23, 2021, add \$25 to each registration fee. Requests for refunds of cancelled registrations must be received by the NBA Education Center no later than September 23, 2021 and are subject to a \$25 cancellation charge per registrant. No refunds will be made after September 23, 2021. Substitutions are allowed at any time.

FULL REGISTRANTS <i>(Please type or print)</i>		For Full Registrants:					TOTAL DUE
		Full Member Registrant \$405 / \$205	Please indicate which of the following functions you will be attending:				
FIRST NAME	LAST NAME	Non-Member \$1,215	Continental Breakfast	Awards Luncheon	Evening Banquet	GOLF \$125	
1.							
2.							
3.							
4.							

PARTIAL REGISTRANTS (Please type or print)		Spouse/Guest of Full Registrants: (These options do not include the general sessions)			TOTAL DUE
		Continental Breakfast ONLY \$25 p/p	Awards Luncheon ONLY \$55 p/p	Reception, Banquet, Entertainment ONLY \$125 p/p	
FIRST NAME	LAST NAME				
1.					
2.					

Three Ways to Register:

- ☎ FAX: (402) 474-2148
✉ MAIL: NBA Education Center,
PO Box 80008, Lincoln, NE 68501
☎ PHONE: (402) 474-1555

TOTAL DUE \$ _____

Payment Choice (check one):

☐ MasterCard ☐ VISA ☐ Discover ☐ American Exp.

Cardholder Name: _____

Card Number: _____ CVV: _____

Exp. Date: _____ Signature: _____

Preferred Golf Partners: You may request preferred golf partners.
The rest of your group will be assigned. **Requests of golf partners
are not guaranteed.**

- _____
- _____
- _____
- _____

2021 Women in Banking Conference



Register Today!
October 27 – 28, 2021
Embassy Suites Omaha | La Vista

Join your peers at NBA's seventh annual **Women in Banking Conference** and learn skills to improve your effectiveness inside and outside of the bank. Women in all areas of the bank will benefit; from supervisors to bank presidents, to lenders and customer service personnel.

Wednesday, October 27, 2021

8:30 a.m. Registration / Refreshments

9:00 a.m. Welcome and Opening Remarks

9:15 a.m. **FINES DOUBLE IN ROAD CONSTRUCTION**

Deadra Stanton, *Creative Communications*

Before we can grow professionally, we need to keep focused on our life journey. When we are traveling so fast and so furious, we sometimes limit our ability to navigate our path.

After this presentation the participant should have strategies to help maintain their focus and make sure they stay open to new ideas, a revitalized sense of self, and making the trip is enjoyable.



10:30 a.m. Break

10:45 a.m. **WHAT BANKS SHOULD KNOW ABOUT MITIGATING A CRISIS IN TODAY'S "CANCEL CULTURE" ENVIRONMENT**

Mary York, *Founder & CEO, York Public Relations*

Cancel culture. It seems we can barely make it a week without hearing of someone or some organization being "canceled." This concept was largely born out of the #MeToo movement to "cancel" celebrities for problematic actions. As examples, very public individuals like Bill Cosby, Harvey Weinstein and R. Kelly were all "canceled" by the public before their trials. But at its core, this concept is nothing new. It may have become more politicized in recent years and certainly more visible with platforms like Twitter and Facebook, but "cancel culture" has simply become a new buzzword for boycotting a group because of differing views – and banks are no exception. This session will discuss the most dangerous crises that customers would 'cancel' their bank over, and best practices for navigating a crisis.

12:00 p.m. Luncheon

1:00 p.m. **GUIDING TODAY'S WOMEN BANKERS: THE ROLE OF WOMEN BANKERS AS MENTORS**

Sherene McHenry, Ph.D., CSP, *The People IQ Expert*

Did you know that women head less than 1% of today's Fortune 1000 companies? Do you look around you and wonder about the values, skills, and future of today's new bankers? This session will explore the value of women in guiding tomorrow's bankers and provide practical tips for maximizing mentoring relationships.



2:00 p.m. Break

2:15 p.m. **HUMAN TRAFFICKING-THE FINANCIAL INDUSTRY'S ROLE IN ENDING MODERN SLAVERY**

Terri Luttrell, *Compliance & Engagement Director, Abrigo*

Human trafficking is one of the fastest growing criminal activities in the world, exploiting an estimated 45 million victims a year and generating approximately \$150 billion in profits. The good news is that with education, knowledge of red flags and victim indicators, and by building strong relationships with law enforcement, the financial industry can help disrupt this form of modern slavery.

3:15 p.m. Break

3:30 p.m. **FEARLESS**

Kat Perkins, *"The Voice" Contestant*

Kat competed on season six on NBC's The Voice and finished as a Top Four finalist. As part of her Fearless 2.0 Campaign, Kat will share an inspiring message about finding your passion, assuming leadership, developing and maintaining a positive attitude, working towards your dreams and becoming FEARLESS. As a nationally recognized speaker and entertainer, humanitarian and founder of her own non-profit, Kat will leave you with a renewed sense of confidence and a full heart.

4:30 p.m. **READY, SET, ACTION! A time for networking, sharing refreshments, and a movie!**

Join us immediately following Kat's session, at *Alamo Drafthouse* for a private screening of the newly released, comedy, **"TOGETHER,"** starring James McAvoy and Sharon Horgan. Academy Award nominee Stephen Daldry shares the story of a family, like so many, who found a way to survive in 2020 – together. This hilarious and heartbreaking story intimately shows two partners forced to re-evaluate themselves and their relationship through the reality of lockdown.



Adjourn – Dinner on Your Own!

Thursday, October 28, 2021

8:00 a.m. Refreshments

8:30 a.m. **TRY, TRY AGAIN**

Laurie Stewart, President & CEO, Sound Financial Bancorp

Stewart will share her journey as an accidental banker in this thoughtful session that describes how to achieve your goals, one try at a time. You will hear about her career to the C-Suite as well as learn some tools that may guide your journey. Come laugh with her and take away some practical ideas.

9:30 a.m. Break

9:45 a.m. **EXECUTIVE PANEL DISCUSSION**

Female leaders have many of the same qualities as their male colleagues, especially an ability to set high goals and inspire others to fulfill them. But women are different in some ways that make them valuable additions to decision making teams. Join us to learn from our panel of bankers from varying communities and bank sizes, who will share their story of leadership from a woman's perspective. Our Panel includes:

Laurie Stewart, President & CEO, Sound Financial Bancorp (moderator)

Natalie Bartholomew, The Girl Banker, CAO & VP, Grand Savings Bank

Leslie Andersen, President & CEO, i3 Bank

Kathryn Barker, Senior Vice President, Core Bank

10:45 a.m. Break

11:00 a.m. **OWN IT: BEING A WOMAN IN BANKING**

Natalie Bartholomew, The Girl Banker, CAO & VP, Grand Savings Bank

Own It: Being A Woman in Banking presents immediate take-aways for session goers including information on mentorship, building your own personal brand, the importance of advocating for women in your organization, and much more.

12:00 p.m. Adjournment

Registration Information

Member Fee:

First Person - \$299 *

Each Add'l - \$285 *

Non-Member Fee:

\$897 per person*

**If received by October 20, 2021*

This fee includes all conference materials, refreshments, luncheon, and Wednesday evening event. The deadline for registrations and refunds for cancelled registrations is **October 20, 2021**. Any registrations received after that date will be an additional \$25 per person and subject to space availability.

Location Information

Reservations can be made by calling the hotel directly by October 5. Please mention that you're with the NBA room block. The NBA rate is \$139 plus taxes.

Embassy Suites Omaha | La Vista

12520 Westport Pky, La Vista / (402) 331-7400

*Please feel free to dress casually.
To ensure your comfort, please bring a light jacket or sweater to the program.*

Notice: If you have a disability that may affect your participation in this event, please forward a statement regarding any special needs to the Nebraska Bankers Association. We will contact you to discuss accommodations.

REGISTRATION FORM ON BACK COVER!

CONFERENCE SPONSORS



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1-09/07/21



2021 Women in Banking Conference

Embassy Suites Omaha | La Vista
October 27 – 28, 2021

Financial Institution: _____

Bank / Branch Address: _____

City/Town: _____ Zip: _____

Phone# (_____) _____

Please register the following individual(s): NAME <i>(as you wish it to appear on the badge)</i>	Email Address	Member Fee: First person - \$299 Each Add'l - \$285 Non-Member Fee: \$897 per person	(✓) CHECK HERE TO CONFIRM YOUR PARTICIPATION IN THE WEDNESDAY EVENING EVENT AT ALAMO DRAFTHOUSE

Registrations received after October 20 will be an additional \$25 per person.

ONLINE YOU MUST LOGIN TO RECEIVE MEMBER DISCOUNTED PRICING!

TOTAL DUE \$ _____

Four Ways to Register:

☎ FAX: (402) 474-2148

✉ MAIL: NBA Education Center,
PO Box 80008, Lincoln, NE 68501

☎ PHONE: (402) 474-1555

🌐 WEBSITE:

www.nebankers.org

→Education→

Event Calendar

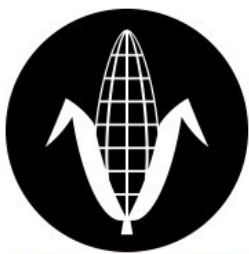
Payment Choice (check one):

☐ MasterCard ☐ VISA ☐ Discover ☐ American Exp.

Cardholder Name: _____

Card Number: _____ CVV: _____

Exp. Date: _____ Signature: _____



NBA Nebraska
Bankers
Association

Agri-business Recognition Award

Application Form

The Nebraska Bankers Association established the NBA Agri-business Recognition Award in 1983. Award recipients, recommended by the NBA Education Advisory – Lending Subcommittee and approved by the NBA Board of Directors, are chosen in honor of their outstanding contribution to agri-business in the State of Nebraska. Past recipients have come from private industry, the educational arena, or government service. The annual presentation of this prestigious award takes place during the NBA's Fall Agri-business Conference which is to be held September 1 – 2, 2022, in Lincoln.

The NBA strongly encourages your participation in the selection process by nominating an individual who has contributed significantly to the State of Nebraska's agri-business industry. Contributions to agri-business are the only criteria, and include, but are not limited to: economic, educational, entrepreneurial, and/or technological innovations. The NBA Education Advisory – Lending Subcommittee in determining their recommendation to the Board of Directors will carefully evaluate your nomination. If your previously submitted nominee was not selected in past years, please feel free to re-submit his or her nomination for this year's award.

Please take time to complete and submit the following application. Supporting materials (resume, letters of support, copies of service awards, continuing education certificates, newspaper articles, etc.) are not required, but are helpful.

The deadline for nominations is **May 20, 2022**.

Please return this form to:

Ron Arrigo, Nebraska Bankers Association

Fax: (402) 474-2148 Email: ron.arrigo@nebankers.org

Please type or print:

Nominee Information

Name: _____
Title: _____
Institution/Company: _____
Address: _____
City/State/Zip: _____
Phone: _____ E-mail Address: _____

Nominated by

Name: _____
Title: _____
Institution: _____
Address: _____
City/State/Zip: _____
Phone: _____ E-mail Address: _____
Signature: _____ Date: ____/____/____

(Application form must be signed and dated).

(Application continued on next page)

2022 Agri-business Recognition Award

Application Form

Page 2

By attachment, please provide the following:

- Information that you feel most important for the ag committee members to have to make their recommendation. Contributions include, but are not limited to economic, educational, entrepreneurial, and/or technological innovations.
- A list of your nominee's career/work history (*resume may also be attached*).
- Your nominee's industry and community leadership.
- A list any other information that you feel is relevant for your nominee to be selected as the recipient of the NBA's 2022 Agri-business Recognition Award.

Please fax or email this form by **May 20, 2022**:

to: **Ron Arrigo, Nebraska Bankers Association**

Phone: (402) 474-1555

Fax: (402) 474-2148

Email: ron.arrigo@nebankers.org



233 South 13th Street, Suite 700
Lincoln, NE 68508
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Past Recipients of the NBA Agri-business Recognition Award

1983 Roger Mandigo	1993 Daniel W. Gardner	2003 Tony Raimondo and Richard Reinke (Posthumous)	2013 Dr. Ronald J. Hanson
1984 Senator Maurice Kremer	1994 Leonard T. Fleischer	2004 Frank J. Sibert	2014 Harley D. Bergmeyer and Alan J. Svajgr
1985 D.B. "Woody" Varner	1995 Waldo Haythorn	2005 Dr. Allen Blezek and Roy Dinsdale	2015 James "Jim" Trotter
1986 Bob Daugherty and Walter Behlen	1996 Robert L. Raun and Robert Kayton (Posthumous)	2006 Don G. Johnson	2016 Thomas F. Hansen
1987 Burnham Yates	1997 William J. Pullen and Harold Wimmer	2007 Willard Waldo	2017 Michael J. Kelly
1988 Kirk Jamison and Ambassador Clayton Yeutter	1998 Frank & Mary Bruning	2008 Howard Pitzer (Posthumous)	2018 John R. Miller and LeRoy Thom (Posthumous)
1989 Congresswoman Virginia Smith	1999 Jack Maddux	2009 Howard A. Lamb	2019 Jerry & Bill Adams
1990 Mr. Earl H. Monahan and Charles M. Harper	2000 James W. Lindsay	2010 John C. Owens	2020 Thomas H. Jensen
1991 C.G. "Kelly" Holthus	2001 Edward T. Robinson	2011 David M. Kohl, Ph.D.	2021 Jim & Greg Linder
1992 Thomas H. Olson	2002 James M. Wolf (Posthumous)	2012 Robin Marshall	

save the date

Don't miss the
**Bank Executives
and Directors
Conference!**

February 27 – March 2, 2022

**Turtle Bay Resort
Oahu', Hawaii**



Sunday, February 27, 2022

Reception

Monday, February 28, 2022

General Session

Spouse Brunch

Golf Outing / Optional Tours-Activities

Reception & Dinner

Tuesday, March 1, 2022

General Session

Optional Golf/Tours-Activities

Evening on Your Own

Wednesday, March 2, 2022

General Session

Closing Lunch



***Watch your email and
Update newsletter for
additional program
details and
registration
information!***



NBA Nebraska Bankers Association