



RETAIL BANKING CONFERENCE

MAY 1-3, 2024

ROSEN PLAZA HOTEL • ORLANDO, FLORIDA

LEARN

FROM THE BEST INDUSTRY LEADERS IN RETAIL BRANCHING &

CELEBRATE



Mark Your Calendars, Pack Your Bags, and Set your Out-of-Office Email Message.

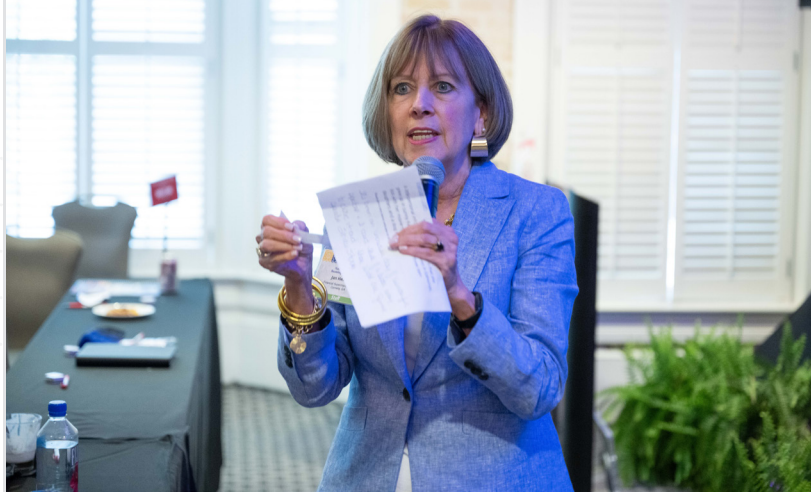
Make plans to join financial institution professionals from across the U.S., a powerhouse slate of presenters, and the FSI team for our Annual Retail Banking Conference in sunny Orlando, FL. This year's event is a celebration as FSI reaches its 40th year serving the banking industry.

This year's event promises to provide an unforgettable experience you will not want to miss! Conference attendees engage with industry leaders and professional experts and gain valuable insight and practical knowledge to make an impact within their role. Each session is uniquely designed to equip attendees with trends, tips, and best practices aimed at helping to develop a personal and professional game plan for success.

You are invited to join us for our 40th Anniversary Celebration.

As we step into 2024, we are thrilled to commemorate FSI's remarkable 40-year journey of helping banks and credit unions across the nation expand, remodel, and grow. We invite you to join us at this year's conference where we will celebrate this momentous anniversary with a host of enjoyable activities.





ROSEN PLAZA HOTEL

9700 International Drive
Orlando, Florida 32819
800.672.8258

ROOM RATE: \$165

(\$20 per additional person)

Group Rate Expires April 1, 2024



Nestled among Orlando's premier accommodations, the Rosen Plaza Hotel stands out for its commitment to excellence. Guided by independent hotelier Harris Rosen's high standards of quality and unsurpassed service, a team of experienced professionals fulfill the companies' pledge to guest and associate satisfaction.



At the end of each day, continue the excitement with Point Orlando, an open-air shopping, dining and entertainment complex just across the street. Or, delve into the magic of internationally acclaimed theme parks such as Walt Disney World®, Universal Orlando Resort, and SeaWorld® Orlando just minutes away. With our exclusive conference rate secured for three days before and after the conference. There's no better place to extend your stay and make the most of your time in Orlando.



**Book your rooms
online today at
supermarketbank.com.**

ATTENDEE COMMENTS

This was my second conference, and I enjoyed both that I have attended. The amount of consideration put into this event is awesome! I believe this is my new favorite conference to attend.

I enjoyed the entire conference! I am amazed at the wonderful speakers you find.

Great information from speakers to take back from the conference to the branch.

I LOVED the breakout sessions and the speakers. It was nice to hear from other retail banking leaders and their ideas on how to make our branches succeed.

I thought that the speakers were fascinating and very informative. Having the opportunity to network with other retail bankers from across the country was phenomenal.

I am a huge fan of FSI. Every speaker was so good and very creative. I truly come back inspired and ready to take the things I have learned and build a better, stronger team.

I liked that the conference was geared toward positivity and leadership.

I liked having the opportunity to network with peers who I can discuss opportunities for my branch teams. The people from FSI were amazing and easy to talk with. I could tell by the team that FSI is a well-run company that cares for its people.

The conference was a perfect mix of networking (beginning new friendships) while learning and being inspired by a host of terrific speakers.

I loved all the presentations. The information was very relevant.

Everyone was so nice and welcoming. I met some new friends that I hope to keep in contact with. I left the conference with a new confidence on how to manage my staff and grow my branch.

Thank you for your graciousness in making me feel like family at my first event. You are an amazing team.



2024 PROGRAM



WEDNESDAY, MAY 1



1:00 – 3:00 p.m. | Registration/Welcome Reception

2:30 – 3:00 p.m. | New Attendee Orientation

3:00 – 4:30 p.m. | Welcome Celebration/Opening Speaker



KEVIN PAUL SCOTT

Founder, ADDO • Atlanta, GA

ROI: Return on Inspiration

Inspiration is not abstract. It's not fluffy. It's not elusive. It's not unquantifiable. In fact, it's exactly the opposite. Inspiration is attainable and measurable, and when harnessed within your business, it produces more engaged employees, more loyal members/customers, and better results. Kevin will unpack the three indispensable ingredients for an inspired life: a purpose to live for, a problem to tackle, and a partnership with like-minded people.

FORE CELEBRATING

4:30 – 8:30 p.m.

TopGolf Networking Event

As a part of our 40th anniversary celebration, we invite you to an exclusive pre-conference networking activity at TopGolf Orlando. There's no pressure to have a good golf swing or score a lot of points, it's about everyone having a great experience.

TopGolf is competitive fun, plus there's plenty of time to socialize in the driving bays and our private lounge. Pre-registration for this event is required. Don't miss the opportunity to connect with fellow attendees and help us celebrate 40 years in the retail branch business.

Registration for the TopGolf Networking Event is FREE for conference attendees. Additional guests are welcome at \$75 each.*

****Guest rate includes entire activity, transportation and food.***

Activity Includes:

- Transportation to/from venue via chartered motor coach
- 3 jam-packed hours of play and socializing at TopGolf Orlando
- Complimentary TopGolf Instructor to provide swing help and instruction
- Complimentary clubs available at each TopGolf Bay
- Yummy apps & complete BBQ dinner buffet
- Access to private open bar (water, tea, sodas, beer, wine)
- Private lounge area and golf bays reserved exclusively for FSI conference attendees



THURSDAY, MAY 2



8:00 – 9:00 a.m. | **Breakfast Buffet**

9:00 – 12:00 p.m. | **General Session/Morning Breakout Sessions**

GENERAL SESSION



MATTHEW LARGENT

Senior Vice President, Retail
City National Bank & Trust • Lawton, OK

Reveille: A Wake-Up Call for Leaders in Retail Branching

Matthew is invading the keynote session with an explosion of energy and excitement that should be bottled. This former Marine is bringing all the intensity to talk about real-life needs for a leader to create and engage a high-performing team. And, embrace the reality that's harder than we think, and worth more than we realize. Together, we'll share our best practices and emerging strategies for strengthening our collective leadership capacity for overcoming adversity, staying persistent, and taking smart risks.

MORNING BREAKOUT SESSION TRACK 1 - IMMERSIVE LEADERSHIP



TAMARA SCOTT

Vice President, Retail Delivery
Premier America Credit Union • Chatsworth, CA

Branching into Tomorrow: The Customer-First Journey

The future of branch banking and the importance of customer experience is a widely discussed topic. Dive in to learn where your efforts are leading your financial institution and how to make incremental shifts in strategy, process, and behavior to meet the needs of your customers and grow exponentially.



MATT BEAULIEU

Assistant Vice President, Member Services
Service Credit Union • Portsmouth, NH

Design a Sales and Service Culture that Builds Loyalty

Matt guides us through a philosophy aimed at increasing customer loyalty. This approach involves comprehensive staff training, transforming conversations with employees, and fostering meaningful interactions with customers by addressing their needs rather than solely aiming to meet targets. Discover the strategic shift towards a sales and service culture that prioritizes long-term relationships over transactional gains.

MORNING BREAKOUT SESSION TRACK 1 - IMMERSIVE LEADERSHIP



JOHN MERRITT

Vice President of Strategic Initiatives

Tennessee Valley Federal Credit Union • Chattanooga, TN

Optimizing the Branch Experience

Technology integration is at the core of TVFCU's strategy for branch innovation and network expansion. From interactive teller machines to live streaming member service stations, John shares how the credit union is redefining its branch experience with easy-to-use technologies that makes it more convenient for members to do business with TVFCU. This approach improves efficiency and provides more time for branch staff to focus on more personalized member interactions.

MORNING BREAKOUT SESSION TRACK 2 - DEVELOPING HIGH-PERFORMING TEAMS



MARY WOODARD

Vice President, Business Development

Granite Credit Union • Millcreek, UT

How Networking and Volunteering Impact Your Bottom Line and Improve Employee Engagement

Networking and volunteering play pivotal roles in enhancing both individual and organizational success, with a direct impact on the bottom line and employee engagement. Networking facilitates the establishment of valuable connections, fostering collaboration, knowledge exchange, and business opportunities. By cultivating a robust professional network, employees can access a wealth of resources, stay abreast of industry trends, and contribute to organizational growth. Engaging employees in volunteer activities fosters a sense of purpose and community, leading to higher job satisfaction and increased productivity.



REBECCA HANNAH

Branch Manager

Marine Federal Credit Union • Jacksonville, NC

The Future of Self-Service

The more financial institutions move to smaller retail spaces, the more we must provide opportunities for members to self-serve low-value transactions. As the branch experience shifts from transaction-focused into one of sales and service, we, as financial advisors, can focus on the critical high-value steps which build member loyalty and drive financial independence.

12:00 – 1:30 p.m. | Lunch Buffet

1:30 – 4:30 p.m. | Afternoon Breakout Sessions/General Session

AFTERNOON BREAKOUT SESSION TRACK 1 - IMMERSIVE LEADERSHIP



DAVE MARTIN

Founder

Bankmechanics • Sugar Land, TX

An In-Store Pirate Looks at 40

Over the past four decades, in-store and on-site branches have introduced more creative thinking and talented individuals to retail banking than any other area. Dave will discuss key lessons learned and the growing relevance and impact of these 'alternative' branches into the future.



STEVE REIDER

Founder

Bancography • Birmingham, AL

The Role of the Branch in a Multi-Channel World

The seismic changes wrought by the COVID-19 crisis impacted deposit and loan demand, credit quality, and channel use, upending nearly every facet of the banking industry; but especially branch operations. Even as electronic channels emerged, community banks and credit unions have continued to rely heavily on the personal touch-points branches offer. Yet for the better part of a year, consumers largely lost the use of that channel, and in some regions still lack lobby access.

It remains uncertain as to whether branch demand will return now that we have arrived in the post-crisis phase, or whether the COVID period accelerated a permanent shift toward greater use of electronic channels. Accordingly, this session will examine the role of the branch network in today's banking environment, and recommend actions bankers can pursue to maximize the value of their branches in the years ahead.

AFTERNOON BREAKOUT SESSION TRACK 2 - DEVELOPING HIGH-PERFORMING TEAMS



CHRISTY COOLEY

Vice President of Branch Operations

Education First Federal Credit Union • Beaumont, TX

Beyond Transactions

It's an art to foster genuine connections at every touchpoint. As managers we have mastered this technique, but how do we guide our employees and why is it important to do so? Christy will discuss cultivating commitment and the strategies for elevating member loyalty in every interaction during challenging economic times.



MARY KAY VAN GORP

Regional Manager

Community 1st Credit Union • Ottumwa, IA

Practical Strategies for Building Powerful Teams

Mary Kay shares practical strategies and real-world insights to revolutionize your approach to team training. Learn the secrets of effective leadership through two powerful tactics: Consistency and Rapport. Discover how to navigate the landscape of team dynamics and leave with actionable takeaways to elevate your leadership skills.

GENERAL SESSION



JAMES ROBERT LAY

Founder and CEO

Digital Growth Institute • Houston, TX

Banking on Purpose: Elevate the Transformation of People Over the Transaction of Dollars and Cents

The hard truth: consumers don't care about your financial brand's legacy mission of dollars and cents. In fact, 2 out of 3 consumers believe that all traditional financial brands care about are their own interests. This is where a new purpose, one that puts people at the center of all of your thinking and doing, empowers your financial brand to rise among the commoditized masses of other banks and credit unions. Because at the end of the day, all consumers care about is finding someone they can trust to guide them beyond their financial stress towards a bigger and better future. You will also learn how to establish your own purpose-driven digital experiences that are rooted in the latest neuroscience research to maximize your future growth potential.



NETWORK & WIN

Raffle Reception

IT'S BACK!

5:00 - 6:00 p.m.

The Reception Raffle is back and more exciting than ever! Join us at our hotel's intimate event club called 3NINE to network with fellow conference attendees and speakers, enjoy drinks and hors d'oeuvres. You may get lucky and win a prize during the BIG-TIME raffle.

Conference attendees will receive 4 tickets during registration for a chance to win one of the four raffle prizes on display. Winners will be chosen at random towards the end of the reception. Winning tickets will need to be present to win.

Prize values are \$1,000+! You do not want to miss out!



FRIDAY, MAY 3



8:00 – 9:00 a.m. | Breakfast Buffet

9:00 – Noon | General Session

12:00 Noon | Conference Adjourns



RICHARD J. SELLWOOD

SVP/Chief Operating Officer

USF Federal Credit Union • Temple Terrace, FL

Supporting and Retaining Today's Employees

Providing support to employees and retaining talent within an organization is not just a function of HR and training, it's the bedrock of effective leadership. Retention is always a hot topic in executive, board, and management meeting rooms. Leaders often fret over attrition and always seem to settle on the notion that "we just can't keep everyone." I'm here to tell you that maybe it's not as hard as it's made out to be. The right culture and support will allow you to retain your talent and build a winning team. Please join me for a conversation about the four Es of employee support and retention: Empathy, Engagement, Energy, and Enthusiasm!



FRIDAY, MAY 3



ANDREW DAVIS

Author & Keynote Speaker

Monumental Shift, Inc. • Boca Raton, FL

The Loyalty Loop: How Small Things Add up to Big Business

We spend a lot of time telling our clients how different we are. But conduct an online search for the services we provide and you'll quickly find that you and your competitors all sound the same. It's time we stop telling people we're different. Start showing them you're different.

It's time to exploit your loyalty loop. The loyalty loop leverages your existing clients to drive a steady stream of highly valuable, high-margin, new business.

Andrew will help you utilize the power of the new consumer experience. You'll learn how to build anticipation, harness the honeymoon period, and drive inspirational moments that result in new business. Whether you're interested in increasing demand or increasing awareness for the products and services you sell, the Loyalty Loop is designed to build a powerful engine that never sleeps.

You'll leave inspired to re-think the way you win over new clients and transform the way you service the customers you already own. Are you ready to embrace the Loyalty Loop?

12:00 Noon | Conference Adjourns

PRICING

EARLY BIRD DISCOUNT DEADLINE: APRIL 1, 2024

BEFORE APRIL 1

AFTER APRIL 1

Primary FSI Member* Registration

FREE

FREE

Additional FSI Member* Registration

\$599

\$699

Non-FSI Member Registration
(Special Anniversary Rate)

\$999

\$1199

FSI Members are allowed one FREE registrant per FSI Member Branch currently open or planned to be open by August 1, 2025. Additional associates of FSI Member Branches may register at reduced rates. An FSI Member is defined as a person working at or with an FSI Member Branch, which is currently open for business, or who has attended FSI Executive Planning. An FSI Member Branch is a branch facility that is currently under a Consulting/Training Agreement with Financial Supermarkets, Inc. Some limitations apply.