

COMPLIMENTARY EVENT and
CPE CREDIT AVAILABLE



2007

COMMUNITY BANKING FORUM

2017

OCTOBER 11, 2017

Lambeau Field | Legends Club Room

8:30 a.m. – 3:30 p.m.

JOIN US the night before
the forum for a cocktail and
hors d'oeuvres networking
reception in the Hall of Fame!

Exclusively Designed for Community Banking
Executive Officers and Board Members

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2007 **COMMUNITY
BANKING FORUM** 2017

The Community Banking Forum has been designed exclusively for executive officers and board members of community banks. This event will provide you with information on and insight into current topics that are deeply impacting community banks today. The speakers, topics, and value-added information, combined with the opportunity to network with your peers, make this event one you will not want to miss!

In celebration of our 10th Annual Community Banking Forum, we are hosting one large forum. Please join us for a pre-forum session on Tuesday, October 10, 2017, at Lambeau Field, followed by a networking reception with hors d'oeuvres and cocktails in the Hall of Fame, and for our forum at Lambeau Field in the Legends Club Room on Wednesday, October 11, 2017.

"You identified a real issue facing our industry and provided valuable perspective."

Dan Johnson, Venture Bank

There are many hotels within a few miles of Lambeau Field, please feel free to stay at any of them if you need accommodations. For your convenience, we have set up a couple of discounted room blocks with the following hotels:

Tundra Lodge Resort & Conference Center

865 Lombardi Avenue
Green Bay, Wisconsin 54304

Special group rates available: \$89/night

Wipfli room block available until Monday, September 25, 2017.

Phone reservations: 877.886.3725

Room block code: 22574

Comfort Suites Hotel

1951 Bond Street
Green Bay, Wisconsin 54303

Special group rates available: \$90/night

Wipfli room block available until Monday, September 25, 2017.

Make reservations at: <https://goo.gl/QrGzVf>

QUESTIONS?

contact Mary Boortz

715.858.6677 | mboortz@wipfli.com

or visit wipfli.com/CBforum2017

for conference information.

Tuesday, October 10, 2017

5:00 – 6:30 p.m.

PRE-FORUM SESSION

What Is FinTech, and Why Should I Care?

Brian Blaha, Wipfli, Michael Busch, Burling Bank, and Chris Rentner, Akouba, Inc.

7:00 – 10:00 p.m.

Networking Reception in the Hall of Fame – Hors d' oeuvres and cocktails

Wednesday, October 11, 2017

8:00 – 8:30 a.m. | Registration and Continental Breakfast

8:30 – 9:30 a.m.

Economic Outlook

Dr. Lindsey Piegza, Chief Economist, Stifel Fixed Income

9:30 – 10:20 a.m.

The Benefits of Continuous Process Improvement

Sue Kappel and Brett Polglaze, Wipfli, and Jeff Whitrock, Pioneer Bank

10:20 – 10:35 a.m. | Break

10:35 a.m. – 12:00 p.m.

Cybersecurity Threats, Trends, and Strategies

Mark Scholl, Wipfli, and Byron Franz, FBI

12:00 – 1:00 p.m. | Lunch

1:00 – 2:15 p.m.

KEYNOTE – Making a Game Plan

Mark Murphy, Green Bay Packers

2:15 – 2:30 p.m. | Break

2:30 – 3:30 p.m.

Leaders of Tomorrow Are Developed Today

Julia Johnson, Wipfli

“Excellent topics and presenters. All directors should hear the presentations.”

Bruce Rokke, KeySavings Bank

JOIN US FOR TWO PRE-FORUM EVENTS: A FinTech session and a networking reception.

PRE-FORUM SESSION What Is FinTech, and Why Should I Care?

Tuesday, October 10, 2017
5:00 – 6:30 p.m.

The Legends Club Room, Lambeau Field

NETWORKING RECEPTION with hors d'oeuvres and cocktails!

Tuesday, October 10, 2017
7:00 – 10:00 p.m.

The Hall of Fame, Lambeau Field



KEYNOTE – Making a Game Plan

Mark Murphy – Green Bay Packers

Under the guidance of President and CEO Mark Murphy, the Green Bay Packers organization continues to rank as one of the NFL's premier franchises, with highly successful operations both on and off the field. In this special keynote session, Murphy will share his thoughts on what it takes to build a world-class organization and championship brand, as well as provide details of the exciting recent development of the Titledown District around historic Lambeau Field.



Mark Murphy, President and CEO – Green Bay Packers

Mark Murphy, possessor of extensive experience in professional football and sports administration, is in his ninth year as the Packers' president and CEO. Under his guidance, the organization continues to rank as one of the NFL's premier franchises, with highly successful operations both on and off the field. On the field, the team has compiled a 90-50-1 overall record (.642), made seven straight playoff trips, and earned a victory in Super Bowl XLV. Off the field, the club continues to perform well in its business efforts, which allows the organization to support football operations. The fan experience at Lambeau Field, a top priority for the organization, continues to be ranked among the best in sports. Among Mark's first Packers initiatives was to update the organization's strategic plan, a process involving all the leadership positions of the organization, including the Executive Committee and football operations. The process created core objectives to serve as a backdrop for all key business decisions.

SPECIAL SESSION: Economic Outlook

Dr. Lindsey Piegza

Chief Economist Dr. Lindsey Piegza will look at the pace of our economic recovery and what it means going forward for overall growth, interest rates, and monetary policy. Piegza will cover macro-economic trends in consumer behaviors and in the financial and banking industries, in addition to new Federal Reserve policy initiatives and potential economic effects of these changes. She also will examine economic growth in the United States as a whole and its effects on interest rates.



Dr. Lindsey Piegza, Chief Economist – Stifel Fixed Income

Dr. Lindsey Piegza is the Chief Economist for Stifel Fixed Income. She specializes in research and analysis of economic trends and activity, world economies, financial markets, and fiscal policies. In addition to more than 13 years of professional experience, she has published academic papers in prestigious journals such as *Harvard Business Review* and in textbooks from Northwestern University's Kellogg School of Management. Often quoted in the business press, Lindsey is a regular guest on CNBC, Fox News, CNN, and Bloomberg, as well as national radio and other business news outlets. She is also a highly sought-after speaker across national and international forums. Lindsey is a member of the National Association for Business Economics (NABE) and American Economic Association (AEA). She holds a B.A. from Northwestern University in political science and a B.A. in economics with honors and distinction and earned her Ph.D. in economics from the City University of New York.

"This was a very useful event that is equally beneficial to director, E-suite, and management levels. "

Carl Helmuth Jr., Marquette Bank

PRE-FORUM SESSION

Tuesday, October 10, 2017

5:00 – 6:30 p.m.

What Is FinTech, and Why Should I Care?

There is an old adage: "If you can't beat them, join them!" Discover how a community banker, faced with major change in his client base, looked outside the traditional banking tool kit to replace his client base by not only embracing opportunities with a FinTech company, but taking it one step further. In this pre-forum session, you will get not only a high-level overview of the disruption of FinTech, but options to embrace it and use it to your advantage.

FORUM SESSIONS

Wednesday, October 11, 2017

8:30 – 9:30 a.m.

Economic Outlook

Chief Economist Dr. Lindsey Piegza will look at the pace of our economic recovery and what it means going forward for overall growth, interest rates, and monetary policy. Piegza will cover macro-economic trends in consumer behaviors and in the financial and banking industries, in addition to new Federal Reserve policy initiatives and potential economic effects of these changes. She also will examine economic growth in the United States as a whole and its effects on interest rates.

9:30 – 10:20 a.m.

The Benefits of Continuous Process Improvement

This session is for senior leadership, executive management, and boards of directors whose job duties include overseeing many or all of the people and processes in a financial institution. We will introduce the concepts, outcomes, and benefits of process improvement events and how to build on these efforts to create a culture of continuous improvement. This session will include a testimonial from a client who has partnered with Wipfli to implement a culture of continuous improvement for his organization.

10:35 a.m. – 12:00 p.m.

Cybersecurity Threats, Trends, and Strategies

You can't have a cybersecurity strategy unless you know what you are up against. Cyber threats have evolved from worms, viruses, spyware, and botnets to more targeted cyber espionage such as dynamic ransomware and stealth botnets. Attacks have become blended, involving combinations of both crimeware and social engineering techniques. Many industry experts believe there are even more sophisticated scams to come. This session will discuss cyber threat trends, real-life case studies, and ways your bank can mitigate its risk and meet regulatory expectations.

1:00 – 2:15 p.m.

Making a Game Plan

Under the guidance of President and CEO Mark Murphy, the Green Bay Packers organization continues to rank as one of the NFL's premier franchises, with highly successful operations both on and off the field. In this special keynote session, Murphy will share his thoughts on what it takes to build a world-class organization and championship brand, as well as provide details of the exciting recent development of the Titletown District around historic Lambeau Field.

2:30 – 3:30 p.m.

Leaders of Tomorrow Are Developed Today

As the qualified labor market continues to shrink, key leaders prepare for retirement, demographic shifts escalate, and employees redefine the workplace, banks need to be proactively engaged in developing and managing their talent. Today's emerging leaders need to be cultivated and challenged. It is important to establish an intentional, systematic strategy to support and utilize the differences and strengths of each next generation. We will explore the Leadership Effectiveness Loop and how this loop can be used to develop your leaders of tomorrow.



Brian Blaha, Growth Partner – Wipfli

Brian Blaha is the growth partner on the firm's leadership team, responsible for the oversight of growth strategy and its execution across the firm. As growth partner, his goals are to focus and prioritize firm growth, drive digital transformation, and align market needs with services and solutions. Before becoming growth partner, Brian was partner in charge of Wipfli's Westchester office and was the Chicago market leader.



Michael Busch, President – Burling Bancorp, Inc.

Michael Busch is president of Burling Bank and Burling Ventures, wholly owned subsidiaries of Burling Bancorp, Inc. He has more than 20 years of banking experience focused on the areas of regulatory compliance, operations, marketing, client service, and business development. As president of Burling Bank, he is responsible for overseeing bank operations, planning, policies, and practices, as well as managing relationships with governmental agencies, business partners, civic organizations, charities, and media. Michael was previously an independent commodity futures trader on the Chicago Board of Trade and served as Assistant Press Secretary to President George H.W. Bush.



JoAnn Cotter, Partner and Industry Practice Leader – Wipfli

JoAnn Cotter is an audit partner and the leader of Wipfli's industry practice. She has over 30 years of experience in auditing and consulting with financial institutions. As a client relationship executive, JoAnn's key points of focus are proactive communication, value-driven consultations, and education. As the industry practice leader, she is responsible for the overall financial results, strategic direction, and development of services within the industry practices, as well as partner and associate development.



Byron Franz, Special Agent – Federal Bureau of Investigation (FBI)

Byron Franz is a Special Agent of the Federal Bureau of Investigation (FBI) and has worked on national security matters for over 20 years. He currently serves as the FBI Milwaukee office's private sector coordinator, where his job is to raise awareness of cyber and insider threats to business, academia, and state/local governments. He holds a B.A. in Russian and a law degree, both from the University of Wisconsin-Madison.



Julia Johnson, Senior Manager – Wipfli

With more than 20 years of diversified human resources and organizational development experience, Julia Johnson works closely with community bank presidents and boards of directors to provide human resources (HR) consulting services. While she has a strong focus on and deep expertise in the financial institutions industry, she also provides services to clients in other industries (e.g., nonprofit, governmental, manufacturing, and health care), enabling her to capture best practices. Julia applies innovative yet practical solutions to help clients achieve success through the talents of their people.



Sue Kappel, Senior Manager – Wipfli

With over 20 years of experience working in a financial institution and over 15 years with Wipfli providing consulting services, Sue Kappel is able to bring hands-on experience to her clients and offer targeted suggestions for improvements in operations processes and workflow, profit improvement strategies, Bank Secrecy Act (BSA) compliance, and other special project engagements.



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Brett Polglaze, Senior Manager – Wipfli

Brett Polglaze is a senior manager in Wipfli's manufacturing and distribution team with over 14 years of experience in using, implementing, and managing enterprise resource planning (ERP) software solutions. He has led all aspects of Microsoft Dynamics AX ERP implementations, serving as project manager, business analyst, solution designer, lead functional consultant, trainer, and every role in between. Brett leverages his experience and passion for solution design to assist clients in creating the optimal software solutions for their business.



Chris Rentner, Founder and CEO – Akouba, Inc.

Chris Rentner is a successful serial entrepreneur and currently is the founder and CEO of Akouba, a cloud-based technology lending platform for regulated financial institutions. He has overall responsibility for the vision, growth, and strategy of Akouba. Furthermore, Chris maintains Akouba's relationships with organizations such as FIS, D+H, Bank Director, the ABA, and government agencies including the CFPB.



Mark Scholl, Partner and Illinois Market Leader – Wipfli

Mark Scholl is a partner and leader of the firm's information technology services within the financial institutions practice. With more than 30 years of experience, he specializes in all aspects of technology services, primarily for financial institution and health care clients. In addition, Mark has an internal leadership role as the Illinois market leader, responsible for oversight and growth.



Mike Vesel, Partner and Financial Institutions Practice Leader – Wipfli

Mike Vesel is an audit partner and the partner in charge of Wipfli's financial institutions practice. As the leader of the financial institutions practice, he is responsible for the overall financial results, strategic direction, and development of services within the practice, as well as partner and associate development. Mike's recruiting and strategic planning experience helps him to understand and provide value in a variety of client situations. His clients value his experience and responsiveness, and they often call him first when they have questions.