

Foundations of Banking School

December 4 - 8, 2023 | Louisville, KY | KyBanks.com

 KBA EDUCATION ALLIANCE



WHERE BANKING EXCELLENCE BEGINS!

Who Should Attend?

The New Bank Employee

This individual may have a college background. However, they are new to the industry and will benefit from a program that introduces them to banking from a management perspective.

The Experienced Bank Employee

This individual is someone who has been with the bank for several years and has not had the time or opportunity for comprehensive bank training. This individual knows his or her job well but may lack knowledge of how the whole bank and financial system interact.

The Bank Employee on a Career Track

This individual is someone who plans to attend the KBA General Banking School but needs the prerequisite training courses in Accounting, Money and Banking, or Banking Fundamentals. Successful completion of the Foundations of Banking School satisfies these prerequisite requirements.

What You Learn.

Practical Exercises

The Foundations of Banking School consists of practical classroom sessions and exercises with a computer-generated bank simulation. The Foundations of Banking School curriculum walks the banker through the bank using the balance sheet and income statement as guides for understanding bank profitability.

Enhance Your Grasp

Several additional components have been added to the curriculum to enhance an individual's grasp of the material and to strengthen their ability to interact and relate to their peers, employer and the organization.

Foundations of Banking School serves as a prerequisite for our more advanced General Banking School.

**2024 GENERAL BANKING SCHOOL
JUNE 3-7, 2024**

Curriculum

Take your career to the next level!



THE BALANCE SHEET & INCOME STATEMENT ESTABLISHING A PERSPECTIVE

There are many ways to examine a bank and its performance. In this class, participants examine the various components of the balance sheet and income statement of a bank. The link between the balance sheet and income statement is analyzed and bankers will gain an appreciation of pertinent ratios, such as ROA and ROE, through application of the principles.



BANK BALANCE SHEET FINANCIAL ANALYSIS

This session focuses on bank capital - including its various components and purposes. Participants discuss the role of deposits and other sources of funds, such as Fed funds, FHLB funds, etc. The optimal mix of capital and liabilities will be covered with emphasis on maximizing the value of the bank.



MEASURING, EVALUATING, & ANALYZING PERFORMANCE

Bankers will gain knowledge on how a bank's performance is measured. They will learn key elements such as ROA, ROE, ROR, interest margin and the role of capital. Performance will also be considered from the perspective of the bank's responsibility to the stockholders, customers and its community.



COMPUTER BANK SIMULATION

The curriculum is enforced by the inclusion of a computer bank simulation. Participants work in the classroom to manage a bank in a simulated environment. The simulation illustrates the principles and concepts presented in the core curriculum and bankers end the school week with a presentation of their lessons learned. If you have a laptop or ipad available, please bring it with you.



To successfully complete the required course of study and graduate from the school, the following requirements must be met. Participants must:

- Attend all classes
- Complete all assignments
- Participate in all school activities
- Participate in all exams and achieve a passing grade

KBA Staff

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Logistics

Questions? Email pcross@kybanks.com

LOCATION

Kentucky Society of CPA's
1735 Alliant Ave
Louisville, KY 40299

CHECK-IN

Registrants will check in the first day of the program, Monday, December 4, 2023 at the CPA office. Classes will begin immediately following check-in. All classes will be held at the CPA office.

MATERIALS

Tuition is for a one week in-residence session and includes admission, ABA computer fees, classroom instruction, curriculum materials, lodging (if applicable) and lunch. Participants will be on their own for dinner each evening.

WHAT TO BRING

Participants should bring their own calculator and office supplies for taking notes during class. If you have a laptop or iPad available, please bring it with you.

MEALS

Lunch will be served at the CPA office. Dinner is on your own each evening.

HOUSING

Lodging will be provided at the Holiday Inn Express, 1520 Alliant Avenue, Louisville. Tuition includes lodging Monday through Thursday nights. Roommates will not be assigned. If a registrant prefers to share a room please contact Paula Cross with the information.

PARKING

Parking is on-site in the back parking lot. Enter through lower doors.

TUITION

\$1695; With lodging: \$2,075. See registration form for more details.



Register

Please complete the entire form before Nov. 24th, 2023

NAME Mr. Ms. Mrs.	BANK NAME
TITLE	BANK STREET ADDRESS
NAME ON BADGE	BANK CITY/STATE/ZIP
EMAIL	BUSINESS PHONE
EMERGENCY CONTACT/NAME & TELEPHONE NUMBER	BANK MAIN OFFICE ADDRESS/IF DIFFERENT FROM ADDRESS ABOVE

FOUNDATIONS OF BANKING SCHOOL TUITION

- Tuition w/ Private Room* \$2075
 Tuition Only/No Lodging \$1695

Tuition includes all instruction, supplemental materials, lunches, refreshment breaks and lodging (if applicable). First priority for admission is given to members of the Kentucky Bankers Association. Applicants are accepted on a first come, first served basis.

Applicants withdrawing before November 24, 2023 will be refunded all fees except a \$150 cancellation fee. There is no refund if an applicant withdraws after the deadline or fails to attend the school, with the exception of extenuating circumstances. Due to commitments and expenses we cannot reverse, such as: handouts, food, beverages, room rentals, speaker fees, etc.; even extenuating circumstances will require partial refunds because of these expenses. Substitutions welcome. Refund requests must be submitted in writing/email.

This program does not discriminate with regard to race, age, religion, disability, sex or ethnic origin.

By signing I acknowledge that I have read the accompanying brochure and agree to abide by all the requirements for participation and completion of this program. My registration and signature below also constitutes authorization to release any tests, grades or record of performance to my employer/bank at their request.

APPLICANT'S SIGNATURE _____ DATE _____

This section is to be signed by the bank president, department head, personnel officer or other executive authorized by the bank; the signature confirms that the bank listed above has approved the submission of this application.

NOMINATING OFFICER'S SIGNATURE _____ DATE _____

NOMINATING OFFICER'S NAME [PRINT] _____ TITLE _____

PAYMENT OPTIONS

- Check Enclosed; Check # _____
 Send me an invoice
 Credit Card (CC); type: _____
CC# _____
CC Exp Date _____
CC 3-digit security code _____

APPLICATION DEADLINE NOVEMBER 24, 2023

SEND APPLICATION TO:
KENTUCKY BANKERS ASSOCIATION
ATTN: PAULA CROSS
600 WEST MAIN STREET, SUITE 400
LOUISVILLE, KENTUCKY 40202