

Darden/SNL

# Executive Program in Bank Financial Leadership

February 20-24, 2017 | Charlottesville, Virginia

[marketintelligence.spglobal.com/BFLS](http://marketintelligence.spglobal.com/BFLS)



Presented by

**S&P Global**

Market Intelligence





Darden Executive Education is consistently recognized by Financial Times and currently ranked No. 1 in the world for Faculty (2014-2016), Course Design, Preparation, Teaching Methods and Materials, Facilities, and Food and Accommodations.

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## **S&P Global** Market Intelligence

S&P Global Market Intelligence combines broad data, powerful analytics, and deep sector intelligence to give our clients unrivaled insight into the companies and markets they follow.

# Executive program in bank financial leadership

The Darden/SNL Executive Program in Bank Financial Leadership is designed specifically for bank and credit union finance executives – both current and rising – looking to develop and expand their skills in strategy, leadership and enterprise financial management.

Unlike purely academic or corporate programs, Bank Financial Leadership fosters the continued development of C-Suite executives and enables high-potential managers to develop into great leaders.

Darden's expertise in the Socratic Method creates an environment of accelerated learning by drawing upon real-world business problems and the collective knowledge of the class – a selective group of banking industry executives. The Executive Program in Bank Financial Leadership enables strong managers and strategic planners in the industry to develop into great leaders. This is achieved in large part by Darden's expertise in the Socratic Method. Learning primarily through case study and working in teams, participants are asked to tackle tough, real world challenges.

You'll leave Charlottesville empowered to add more value to your institution and fully realize your potential.

- Integrated curriculum: leadership, strategy, and finance
- Proven Darden case-study learning method
- World-class, top-ranked Darden faculty
- Socratic method
- Learning teams

“Worth the time and money. An excellent opportunity to reflect and grow personally and professionally.”

– Executive VP and CFO,  
A Southeast Bank

“Exceeded my expectations. It was refreshing to alternate between finance and leadership topics.”

– Senior VP,  
A Midwest Bank

# Program overview

## Top-ranked academics

Program instructors come from the Darden School of Business faculty and have earned the school international recognition for its full-time MBA and Executive Education programs. Darden's faculty was ranked #1 in a professional development program survey by the Financial Times seven years in a row.

## Real-world experience

The industry advisers who lead sessions at Bank Financial Leadership are active practitioners in high demand. Their collective experience represents an incredible wellspring of insight and guidance. You'll have a rare opportunity to engage with these leaders in thoughtful discussions unencumbered by interruptions or the distractions of daily business.

## A lasting network

Your time at the program is an unmatched opportunity to build relationships with colleagues and faculty that will serve you throughout your career.

## A proven curriculum

Engaging in Darden's case study method means solving real-world business problems and learning to make difficult decisions with limited information. Through class discussions, case debriefs and small-group Learning Teams, participants learn to persuade and inspire others, to reconcile differing perspectives and to prioritize objectives and capitalize on opportunities.

The case method encourages the development of viewpoints and requires teams to prepare analyses and recommendations that support their views. Small group discussions and classroom debriefs ensure that each person benefits from the diversity of experience and differing perspectives of industry peers.

“I gained perspective, allowing me to think critically and strategically about the challenges facing my organization and the type of leader I strive to be.”

– Past attendee



## What you'll take away

- Methods for bringing finance perspective to your depository institution's strategic planning and risk management activities
- Leadership frameworks for professional growth and fostering a value-adding culture in your team
- Current practices in managing the balance sheet, enterprise risk, acquisitions and capital
- Strategic approaches for balancing the tension between earnings growth and capital efficiency
- A network of peers with whom you've shared a once-in-a-lifetime educational experience

**“A high-caliber group. I learned not only from the instructors, but also from the other attendees.”**  
– Past attendee



**George (Yiorgos)  
Allayannis, PhD**



**Martin N.  
Davidson, PhD**



**S. (Venkat)  
Venkataraman,  
PhD**



**Scott  
Hildenbrand**



**David B. Spencer**

# Your educators

## Darden Faculty

Darden's world-class faculty prides itself on its pedagogical philosophy, its curriculum design skills and its subject matter. The proof is in its top ranking, and it's one more way the Bank Financial Leadership program delivers a superior educational experience to current and future banking industry leaders.

### **George (Yiorgos) Allayannis, PhD**

Professor of Business Administration and Associate Dean for Global MBA for Executives, Darden School of Business

### **Martin N. Davidson, PhD**

Johnson and Higgins Professor of Business Administration, Darden School of Business

### **S. (Venkat) Venkataraman, PhD**

MasterCard Professor of Business Administration and Senior Associate Dean for Faculty and Research, Darden School of Business.

## S&P Global Market Intelligence Faculty

Program instructors are your peers, Wall Street advisers, and other industry practitioners, so you'll get valuable guidance and instruction on topics that include acquisitions, capital raising, balance sheet management, data analytics, the transition to CECL and regulatory interaction – the significant issues you manage and direct daily.

### **Scott Hildenbrand**

Principal & Chief Balance Sheet Strategist,  
Sandler O'Neill + Partners

### **David B. Spencer**

Executive Vice President & Chief Financial Officer,  
Bank of North Carolina

# Your certification

## A certification that carries the Darden reputation

The Darden/SNL Executive Program in Bank Financial Leadership translates the Darden experience into a tightly focused, week-long course. At the end of the program, you'll receive a Certificate in Bank Financial Leadership, representing the foremost curriculum for expanding the enterprise-leading skills of bank finance executives.

## Professional development credits

This program qualifies for 25.5 hours of professional development credit as granted by CFA Institute and 31 hours of CPE credit.



For details see the program website:  
[marketintelligence.spglobal.com/BFLS](http://marketintelligence.spglobal.com/BFLS)



# The curriculum

Agenda and faculty are subject to change. Please check the program website for updates:

[marketintelligence.spglobal.com/BFLS](http://marketintelligence.spglobal.com/BFLS)

## Monday

**Check In to Inn at Darden**

**Welcome reception**

**Dinner**

## Tuesday

**The strategic decisions facing bank executives**

- Evaluating acquisitions/divestitures
- Implementing effective risk management
- Managing capital and liquidity
- Addressing regulatory expectations

**What is strategy and how does it drive success?**

- Starting point: create or acquire
- Succeeding in a competitive market
- Workshop: Can you say what your strategy is?

**Preparing for and executing a bank transaction**

- Positioning for acquisition
- Identifying targets that create value
- Preparing for and completing due diligence
- Determining and negotiating price
- Closing and effectively integrating

**Reception**

**Dinner**

**Learning Team meetings**



## Wednesday

### What is your bank worth and how do you improve it?

- General valuation concepts
- The significant metrics used to measure value
- Traditional valuation methodologies

### Balance Sheet Strategies

- Measuring and managing interest rate and liquidity risk
- Financial instruments and their usefulness
- Strategies for a rising rate environment
- Core deposits, other liabilities and the cost of funds

### Creating and leading high-performance teams

- Effective delegation
- Fostering collaboration
- Empowering innovation

### CECL: Preparing for the Transition

- Managing increased data requirements under the CECL standard
- Educating key stakeholders inside the bank
- The impact on reported financials – perception and reality

### Group Dinner on the Town

- Transportation to and from reception and dinner provided

### Learning Team meetings

## Thursday

### Your Bank's Data and Analytics Strategy

- Using your data as an asset to drive strategy
- Ownership and access of data analytics within your institution

### Achieving corporate coherence/ Understanding bank strategy

### Bank capital, Basel III and the future of banking

### Becoming an outstanding leader

- Forming a leadership perspective
- The multiple roles of a leader
- The relationship between leadership, strategy and leading change

### Reception

### Dinner

### Learning Team meetings

## Friday

### Effectively managing a bank's risks

- The importance of capital and liquidity
- Managing and reducing exposure to uncertainty

### Workshop on scenario analysis

- Defining appropriate scenarios
- Making sense of the results
- Turning results into action

### Award of Certificate Ceremony

### Lunch (optional)

### Program concludes at approximately 1 p.m.

# Accommodations and facilities

Participants in the program stay at the Inn at Darden, conveniently located on the University of Virginia grounds, directly across from the classrooms. Gracious lodging and modern accommodations feature traditional Jeffersonian décor, spacious 290-square-foot rooms, and comfortable queen-sized beds. Your exclusive, executive room includes private bath, complimentary WiFi, work desk, cable TV, microwave, coffee maker and mini-fridge replenished daily with complimentary water.

At the Inn, you'll find a fully equipped fitness center, recreation room and small-group discussion rooms connected to Darden's video and computer networks.

You'll have full use of the Darden library, granting you access to the wealth of information you would expect from one of the world's top graduate business schools.

Meals are served in the Abbott Center dining facility, adjacent to the classroom building. Darden consistently achieves top-five ranking globally for food, accommodations and facilities.



# Program essentials

## Who attends

Program participants should have significant experience and financial responsibilities within depository institutions.

Typical titles of attendees include:

- C-Suite Executives
- Board Directors
- Controller
- Treasurer
- SVP, VP, AVP of Finance

## When and where

February 20-24, 2017  
University of Virginia Darden School of Business  
Charlottesville, Virginia

## Register early and save

- Price from October 1 - December 31: \$6,495
- Price from January 1, 2017 forward: \$6,995

The fee covers materials, meals and private room at the Inn at Darden.

## Registration

Phone:  
+1.877.833.3974 (U.S./Canada)  
+1.434.924.3000 (worldwide)

Website:  
[marketintelligence.spglobal.com/BFLS](http://marketintelligence.spglobal.com/BFLS)

## Is the program right for you?

Call us for a personal discussion of the program's objectives as they relate to your goals:

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