

Member Benefits

Community Bankers of Iowa exists to promote public endorsement of independent banking and to support and secure an environment that is favorable to independent ownership and local control of Iowa banks.



CBI
COMMUNITY
BANKERS OF IOWA
"Banking that is building Iowa"

**Your quick guide to Community Bankers of Iowa
Member Opportunities, Programs and Events**

Member-Driven Direction.



Community Bankers of Iowa was created in 1972 to serve specific interests of Iowa's independent community banks. Membership in CBI benefits the bank, independent banking, and the citizens of Iowa.

CBI's core values, principles, and mission are to promote and defend EXCLUSIVELY the common interests of independent community banks

whose services are vital to the preservation of economic diversity and rural America.

CBI can continue to achieve its objectives only if independent community bankers recognize the need to maintain their own association, and continue to support it through membership and participation. As a small staff association, a majority of members take a voluntary, active role in CBI's programs and activities. All member bankers are invited to help direct the actions of the association by participating on CBI's Board of Directors and various committees.

Five Reasons to Become a CBI Member Bank

Community Bankers of Iowa:

1. exclusively serves Iowa's community bankers
2. provides exclusive and uniquely-focused advocacy, networking and educational programs and events
3. strives to be the first resource for quality products and services not available from other associations
4. is a limited dues association, highly member-driven and directed with a small, efficient staff
5. membership results in lower operational costs, competitive alternatives, and highly effective benefits for community banks

Robert D. Dixon Founders' Award

Established in 2003, the Robert D. Dixon Founders' Award was created to recognize those bankers who have devoted their lives, and livelihoods, to their communities. They embody commitment and devotion, and represent the best in community banking. The award is named for Robert D. Dixon who co-founded Community Bankers of Iowa (then Iowa Independent Bankers) in 1972.

Each year, community bankers from around Iowa present nominations of their peers. The current President of CBI presents the award to the winner at the Kickoff Reception of CBI's Management Conference and Annual Convention, held in July.



Informed, Focused, and Effective Action.

According to CBI members, advocacy is the primary benefit and NUMBER ONE REASON members join Community Bankers of Iowa.

The Community Bankers of Iowa monitors the activities of numerous state and federal regulatory bodies, presents formal comments, and participates in administrative proceedings whenever the interest of its members so requires. CBI maintains and promotes its own state political action committee (PAC).



Community Bankers of Iowa Political Action Committee (CBI PAC)



CBI's Political Action Committee, originally formed in the 1970s, has been vigilant in defense of the views and needs of independent bankers. CBI's ability to bring forward issues and projects of benefit to Iowa's community bankers is supported by our ability to make political contributions to candidates and legislators. CBI PAC is an investment in the future of your bank.

CBI Political Action Committee Facts:

- 100% of contributions stay in Iowa
- supports political candidates in legislative and executive branches of state government
- creates, discovers, and pursues opportunities for Iowa's community banks to participate in the economic growth of their communities and the entire state
- advocates and supports legislation of benefit to community banking in general

Join In CBI's Advocacy Efforts.



State Fair Conference

CBI's State Fair Conference provides a forum for Iowa's community bankers to discuss with legislators how policy changes and regulations are impacting their businesses.

State Fair Conference Facts:

- Held in August, on the election year cycle
- Panel discussions from Iowa's leadership and congressional delegation
- Ask Iowa's leaders about pending legislation, recent law implementation, and upcoming regulations

ICBA Partnership

CBI and ICBA work together to protect the interests of your community bank, your customers and your communities. With state representation from CBI and national representation from ICBA, you can rest assured that your bank has effective advocates looking out for your best interests so you can focus on doing what do what you do best: serving your customers and your community.



Networking Opportunities.

CBI creates opportunities for community bankers across Iowa to join together and stay informed on the latest issues impacting the community banking industry.

Community Bank Summits

The CBI summits bring community bankers together to discuss important topics in the banking industry.



Community Bank Summit Facts:

- Two regional meetings in Spring and three meetings in Fall
- Nationally recognized speakers provide updates on legislation, regulations, and economic development in Iowa.
- Created at the request of community bankers all over Iowa



CBI Golf Tournament & Business Symposium

Community bankers from all over the state attend this annual golf outing to benefit CBI's PAC. Build relationships with fellow CBI members during this fun and relaxing event.

CBI Golf Tournament & Business Symposium Facts:

- Held every September
- 4-Person, Best-Shot Tournament
- Educational Business Symposium features expert speakers in the banking industry

Peer Connection Forum

CBI's Peer Connection Forum is designed as both an educational and networking opportunity for everyone staffing and supporting Iowa's community banks.

Peer Connection Forum Facts:

- One-day event for community bankers and staff below the CEO/President level
- Focused on the Marketing, HR, Operations, IT, Compliance, Lending and Director functional groups
- Co-sponsored by the Leaders of Tomorrow group



Money Smart Week Poster Contest

CBI partners with community banks around Iowa to hold our annual Money Smart Week Poster Contest as part of Community Banking Month activities.



Money Smart Week Poster Contest Facts:

- Coincides with Money Smart Week, held in April
- State-wide contest, open to 2nd through 6th grade students across Iowa
- Intended to increase the awareness of community banks in Iowa and educate students on financial responsibility



CBI Management Conference and Annual Convention

The Management Conference and Annual Convention is a business conference where CBI members gather each year. Held in Okoboji, Iowa, attendees can network, celebrate the association's accomplishments, and learn about best practices in all aspects of community banking and business. CBI's Annual Meeting is held during the Convention.

Management Conference and Annual Convention Facts:

- One and a half day business meeting, held annually in July
- Planned by CBI's Convention Committee, comprised of CBI-member bankers
- National, high caliber speakers provide educational and motivating information
- Filled with events like the fishing tournament, several golf outings and receptions, and a tradeshow and auction to benefit CBI's PAC

Awards presented at CBI's Annual Convention

- The prestigious Robert D. Dixon Founders' Award (see pg 3)
- LOT Scholarship and Up & Coming Banker of the Year Awards (see pg 6)
- Community Bank Month Best-of-the-Best Award

Recognizing Excellence.

CBI celebrates community banking and bankers, and "Going Local".



April marks Community Banking Month, a nationwide celebration recognizing the many contributions community banks make to their customers and communities. Reinforcing the importance of community banking and the "Go Local" effort, Community Banking Month is kicked off with the signing of a proclamation by Iowa's governor.

Community Banking Month Best-of-the-Best Competition

This contest celebrates Community Banking Month in April and awards the CBI "Traveling Trophy" to the member bank that:

- showed excellence in spreading the community banking message
- made the biggest impact on their community through volunteerism, financial literacy programs, and social media campaigns



Educating Generations of Community Bankers.



The Leaders of Tomorrow (LOT) program was created to enhance the growth, leadership and networking skills of Iowa's future banking leaders. It was specifically designed so that members spend a minimum amount of time away from the bank. LOT also assists in the development of the next generation of community banking leaders with their annual **Scholarship Program**.

LOT Program Facts:

- Quarterly meetings encourage professional growth
- Annual **Leadership Development Conference held every Spring**
- Member recognition with the Up & Coming Community Banker of the Year Award
- Scholarship program awards \$1,000 scholarships to two deserving high school seniors



CBI Education Foundation

The CBI Education Foundation was established in 2014 to help improve the financial literacy of Iowa's students, support community bankers' professional education, support higher education for Iowa college students, and encourage senior level college students to consider a career in community banking.

CBI Education Foundation Facts:

- Governed by the Council of Presidents, former presidents of CBI
- Contributions made by both personal and corporate donors are tax deductible
- Programs funded by the Foundation include the Money Smart Week Poster Contest, the Summer Intern Scholarship Program and the LOT Scholarship Program



Certified Community Lender Program (CCL)

Professionalizes the position of a community bank lender and establishes a standard of knowledge.

CCL Program Facts:

- Applicants must have three or more years of lending experience and pass a six hour examination to be awarded the classification
- Designees must renew their certification every two years



Community Bankers for Compliance Program (CBC)

Presented by Young & Associates, Inc. and developed in conjunction with CBI, the Community Bankers for Compliance Program is the most successful and longest running compliance training program in the country.

Community Bankers for Compliance Program Facts:

- Two live seminar sessions held in Spring and Fall
- Provides up-to-date information on compliance issues
- Offers techniques for maintaining your in-bank compliance program



Community Bankers of Iowa Webinars

One of the most popular training methods today, CBI offers over 120 webinars annually on professional banking industry topics.

CBI Webinar Facts:

- Allows unlimited attendees at your office location
- Participants follow along with online visuals
- Significant savings from member-only discounts

Partnering with the best.



Member Discounts & Group Buying Opportunities

Providing best-in-class services, products and insurance to member banks has been the mission of Community Bankers Services and Insurance (CBSI) since 1984. The CBSI Board of Directors meets quarterly to review endorsed vendors and consider new partnerships, often suggested by CBI members.

Community Bankers Services and Insurance Facts:

- Benefits your bank with a choice of the best providers
- Leverages the collective bargaining and purchasing power of community bankers across the state
- Impressive cost savings and premium services for member banks

Get involved: CBI Committees and Peer Groups.



CBI Committees

CBI committees provide the opportunity to network with fellow independent bankers and lead the direction of the association in all aspects, from education and legislation to planning the annual convention and choosing golf courses. CBI also provides administrative assistance including correspondence, meeting details, speaker resources, and other expertises.

Committees members may join include:

- **Management Conference & Annual Convention Committee:** Responsible for the planning and implementation of CBI's Annual Convention.
- **Economic Development Committee:** Help guide CBI's efforts and become an authority on economic development.
- **Education Committee:** Determines viable educational opportunities for our members.
- **CBI Annual Golf Open/Events Committee:** Sets the location and marketing strategy of the annual golf outings.
- **Legislative Action & PAC Committee:** Works in conjunction with CBI's lobbyist to formulate strategy and tactics on the state and federal levels.
- **Membership & Marketing Committee:** Reinforces the value of CBI membership and encourages non-members to join.

CBI Peer Groups

CBI's Peer Groups promote the exchange of information and ideas in a confidential and non-competitive environment, and create a network of industry professionals with similar experiences where you can ask questions and share best practices.

Peer Groups members may join include:

- **CEO Peer Groups:** For CEOs, Presidents, and senior level executives.
- **Human Resources Peer Group:** Covers topics such as employee incentive programs, HIPPA, interviewing, job descriptions, and performance reviews.
- **Marketing Peer Group:** Discusses imaging campaigns, incentive programs, senior clubs, target marketing, and social media and internet marketing and other relevant topics.
- **Operations Peer Group:** Audits, core systems, disaster recovery, information security issues, IT exams and more.
- **Lending Peer Group:** This group discusses topics like qualified mortgage regulations, loan documentation & policy, portfolio management, borrower analysis and more.

Keeping You Informed.

CBI has a number of ways to inform members of CBI's latest advocacy efforts, industry news, and relevant topics.

Community Banker Update

Community Banker Update is the monthly magazine for the Community Bankers of Iowa's members.

- Sent to over 650 community bankers and industry partners
- Provides news on the association and Iowa's community banking industry
- Available in print and electronic formats



CommonCENTS

- Weekly newsletter published each Friday.
- Reaches over 4,300 community bankers and industry partners
- Contains CBI member and banking industry news
- Delivered in electronic format



CBI Website

cbiaonline.org is the ultimate resource for CBI members to get association updates, the latest news and topical articles on the banking industry, and more. Includes:

- an online community bank search engine
- a downloadable, quarterly Iowa community bank and branch data directory (available ONLY to CBI members)
- information on CBI's educational programs
- listings of of affiliate member's products and services
- updates on CBI's latest advocacy efforts
- online registration for CBI events and seminars



CBI Social Media

CBI also stays connected with community bankers via Twitter and LinkedIn.



- Posts on community banking industry news, bankers' resources, and news and updates on CBI events and programs.
- CBI on LinkedIn: www.linkedin.com/in/communitybankersofiowa
- CBI on Twitter: @IaCommunityBank

Visit www.cbiaonline.org for more in-depth information on CBI benefits, programs and events.

Contacts:

Services, Affiliate Membership, Events:
Jackie Haley, Membership Services Director
jhaley@cbiaonline.org

Communications, News, & Web:
Krissy Lee, Communications Director
klee@cbiaonline.org

Operations, Events, & General Inquiry:
Pretty Patel, Operations Manager
ppatel@cbiaonline.org



1603 22nd Street, Suite 102
West Des Moines, Iowa 50266
Ph: (515) 453-1495 • Fax: (515) 453-1498
Email: cbia@cbiaonline.org
www.cbiaonline.org