The Peer Connection Forum was designed for everyone staffing and supporting Iowa’s community banks. It was originally created as both a learning experience and a networking opportunity for community bank officers and staff below the CEO/President level in the following functional peer groups:

Marketing • HR • IT • Compliance • Lending

This year’s Forum, to be held via webinar, features 11 one-hour sessions over three days touching on topics relevant to the above functional groups. Join sessions related to your area of expertise, or attend them all! Functional group sessions will be held as follows:

Sept. 8  
Compliance

Sept. 9  
Lending & HR

Sept. 10  
IT & Marketing

Find session topic descriptions and a complete schedule on pages 6-8 of this event guide.

Thank You!

We recognize and appreciate the following Sponsors for their support of the 2020 Virtual Peer Connection Forum:
Shane Greenleaf  
*First VP - Commercial Banking*  
*Bankers’ Bank*

Shane began his career in banking in 2002 and joined Bankers’ Bank in 2016 and is currently First Vice President for the IA market in the Commercial Banking division, in addition he also leads the SBA division as well. He has an extensive background in CRE, C&I and SBA lending as well as years of relationship management. Shane brings over 18 years of experience with commercial banks and financial institutions, over his career he has worked in all facets of commercial banking, from underwriting, portfolio management and business development. He grew up in Sioux City, IA and attended the University of Northern Iowa. Shane enjoys spending time with his wife and 2 children as well as donating his time to local and national non-profit organizations.

Kathy Enbom  
*Senior Manager*  
*WIPFLI*

Kathy Enbom has an extensive background in regulatory compliance, marketing, and leadership, which includes significant training in developing, delivering, and implementing instructional programs. She uses her 25 years of experience to enhance the consultative interaction by providing guidance and resources to assist clients in improving their overall compliance management system. Kathy’s well-rounded experience in the financial services industry helped her develop a comprehensive understanding of bank operations and management, resulting in her ability to provide meaningful insight and helpful recommendations in many areas of the organization. Her areas of expertise include BSA exams, fair lending, customized training presentations and compliance management system development.

Leif Christianson  
*Director of Operations*  
*Locknet Managed IT*

Leif Christianson's 20-year-career spans numerous leadership roles in information technology, risk management and banking operations. Through his visionary leadership, his focus on emerging technologies and operational efficiencies; he has played a vital role in multiple organizations. His career includes working for one of the top 200 community banks in the United States and a top 30 managed information technology service provider in North America. 2014 as one of the “Elite 8 Technology Executives” by Information Week–Business Systems and Technology. He holds a B.S. in Management Information Systems from the University of Wisconsin – La Crosse, Master of Business Administration from Lakeland College, and a Six SIGMA Yellow Belt from the University of Wisconsin.

Lyle Kolosik  
*Consulting Manager – Regulatory Compliance, CliftonLarsonAllen*

Lyle has 24 years of experience working for both banks and credit unions. He has served as a compliance officer, mortgage lender, and has also assisted in commercial lending and deposit operations. Lyle also spent time with a national mortgage lender where he helped establish a regulatory compliance program, conducted testing to ensure the mortgage lenders where complying with all applicable laws and regulations, and provided training to the loan officers and other staff on new and existing regulations.
Aaron Donaldson
Principal, Technology and Management Consulting
RSM US LLP

Aaron is responsible for the IT consulting areas of RSM US offices in Mason City and Des Moines, Iowa, Minneapolis, Minnesota, and Sioux Falls, South Dakota. He leads their managed IT services division and is a member of their cloud solutions team, focusing on network design, assessment and implementation, as well as business continuity project management and website development. In addition, he has provided virtual chief information officer services to multiple organizations. Aaron has over 20 years of experience providing clients with IT services and spends most of his time helping clients identify current or future pain points and providing valuable recommendations and solution plans to address those points, while always keeping an eye on the business needs as opposed to the technology wants.

Emily Pontius
Shareholder
Fredrikson & Byron, P.A.

Emily Pontius is an experienced advisor and litigator for employers, defending them against allegations of sex discrimination, age discrimination, race discrimination, FMLA and ADA violations, wrongful termination in violation of public policy, and tortious interference. To help employers maintain a productive workplace and avoid litigation, Emily partners with clients to provide supervisor and manager training, investigate internal discrimination complaints, provide reasonable accommodations to disabled employees, and navigate issues surrounding family and medical leave. She is a Council Member of the Iowa State Bar Association Labor and Employment Section, serving as chair from 2016-2018, as well as a member of the Society for Human Resource Management (SHRM) and Central Iowa Society for Human Resource Management (CI-SHRM). From 2018-2020 Emily has been an honoree on both the Chambers USA America’s Leading Lawyer for Business and Best Lawyers in America lists.

John Streff
IT Security Specialist
Vantage Point Solutions

As both a meticulous security analyst and a dedicated educator, John Streff brings tremendous strength to Vantage Point’s IT Security Team. In his role as IT Security Specialist, he helps banks secure their data network through penetration testing, vulnerability management, policy, and other measures. Beyond technical mastery, John is especially strong at helping to communicate the risks of cybersecurity breaches. Combined with his skill in training this helps companies secure the human side of their organization, protecting entire teams and businesses from individual errors. He specializes in social engineering, security awareness training and publication, and malware analysis.

Andy Campbell
Director of Marketing
Iron Comps

Andy Campbell is the marketing director for Iron Comps, the farm equipment valuation tool powered by Tractor Zoom. Andy is also a managing partner with Pellasota Consulting, past director of marketing for Eurofins Scientific, professor at Central College, and engineer at General Mills. Andy graduated with a degree in engineering and later an MBA from the University of Iowa. Andy, his wife, and three kids reside in Pella.
Patrick Dix is a seasoned media professional and the leader of SHAZAM’s strategic alliances efforts. In a 25-year career as a broadcast journalist, he received recognition for outstanding reporting with awards from The Society of Professional Journalists, The William Randolph Hearst Foundation and the Midwest Broadcast News Association.

Jackie Rolow, SPHR
Executive VP and Chief HR Officer
SHAZAM Network

Jackie has been a vital part of the SHAZAM Network for the past 25 years. She leads the charge to establish and enhance solid HR management practices and retain top industry talent. She plans and coordinates all corporatewide HR functions, consistent with the strategic direction set by the company. Jackie manages information and recordkeeping systems that protect the legal rights of employees, applicants, former employees and SHAZAM. She also collaborates with managers to help them achieve their goals. She is a member of the Society for Human Resource Management (SHRM), which provides the most current and comprehensive resources to HR professionals.

Lincoln Dix
Vice President – Supplies Division
Storey Kenworthy

Lincoln is the Vice President of Storey Kenworthy’s Supplies Division. Lincoln spent 14 years with Staples, the world’s largest office products company, starting as a part-time cashier while in college to his last position of District Sales Manager before departing to go to Storey Kenworthy. For the last 6 years, Lincoln has had the privilege of leading the Storey Kenworthy Division’s growth in sales by over 20%, rationalize expenses, negotiate strategic contracts, and represent the Company with national buying groups and partnerships. He is a former Young Professional of the Year Finalist and 40 Under 40 Alum. He is a board member of the Bondurant Chamber of Commerce, member of Storey Kenworthy’s Senior Management Team, and co-Chairs the Company’s SERVE Committee.
GENERAL SESSION SPEAKER

Tuesday, September 8 | 4:00 - 5:00 pm
Wednesday, September 9 | 11:00 am - 12:00 pm & 4:00 - 5:00 pm
Thursday, September 10 | 11:00 am - 12:00 pm & 4:00 - 5:00 pm

Having Tough Conversations in the Workplace
Jackie Rolow, SPHR, Executive Vice President and Chief HR Officer - SHAZAM Network

Conflict is inevitable — in work and in life. Managers must address performance issues, and colleagues with competing priorities must figure out how to work together. These situations call for having tough conversations. Jackie will explain how to conduct tough conversations, build communication skills and enhance relationships — leading to better business performance. Jackie will also discuss how to identify underlying differences in work styles, goals, and power dynamics and change the way you view conflict. As a bonus, she’ll provide practical tools to help you prepare for your next difficult conversation and make sure you choose words that won’t alienate the other person.

COMPLIANCE GROUP

Tuesday, September 8 | 2:00 - 3:00 pm

Compliance Hot Topics
Kathy Enbom, Senior Manager - WIPFLI

Keeping up with the rapidly evolving regulatory landscape can be challenging; but the importance of knowing what’s new and hot in the industry is critical to managing compliance risk. A Wipfli compliance specialist will lead a discussion on recent regulatory news and hot topics from examinations so that you can help your bank proactively address risks and prepare for your next exam.

Tuesday, September 8 | 3:00 - 4:00 pm

“Challenging Times” and other phrases I never want to hear again: Re-Assessing Risk during COVID
Lyle Kolosik, Consulting Manager--Regulatory Compliance - CliftonLarsonAllen LLP

COVID has created a whole new world – have you adjusted to the new risks that come with it?

LENDING GROUP

Wednesday, September 9 | 9:00 - 10:00 am

Lending In Today’s COVID Environment: Update on PPP, Loan Forgiveness and More
Shane Greenleaf, FVP/Commercial Banking - Bankers’ Bank

Get a quick update on PPP loan forgiveness and how to manage your SBA loans, as well as faster payments and ACH for lenders.

Wednesday, September 9 | 10:00 - 11:00 am

Balancing a Tractor: Protect your bank’s risk position while supporting your farmer’s bottom line with accurate and current collateral values and trends
Andy Campbell, Director of Marketing - Iron Comps

In this forum, Andy will share the most important equipment values and trends within the farm equipment asset class. Lenders are in a difficult position to be good lender and support for your customers, while at the same time being charged with protecting your banks’ financial position. Strengthen your position and knowledge as a lender by better understanding your customer’s operation better, know the true values of their machinery, their second largest asset class on their balance sheet.
SESSION TOPICS

HUMAN RESOURCES GROUP

Wednesday, September 9  |  2:00 - 3:00 pm
Lessons we learned working from home
Aaron Donaldson, Principal, Technology and Management Consulting - RSM US LLP

The pandemic has changed the way we work, what have we learned during our time working from home? What has worked well, what has not.

Wednesday, September 9  |   3:00 - 4:00 pm
Safety, Compliance and Business Continuity during a Pandemic
Emily Pontius, Shareholder - Fredrikson & Byron, P.A.

What’s important to keeping your employees safe and still working? Fredrikson & Byron will discuss handling leave requests, accommodating pre-existing conditions, and best practices for keeping employees and customers safe in the workplace.

INFORMATION TECHNOLOGY GROUP

Thursday, September 10  |  9:00 - 10:00 am
Best Practices for Cyber & Physical Security
Leif Christianson, Director of Operations - LOCKNET Managed IT

This session will discuss supporting employees and customers while working remotely.

Thursday, September 10  |  10:00 - 11:00 am
How to Build an Information Security Awareness Program
John Streff, IT Security Specialist - Vantage Point Solutions

Well-trained employees provide a critical layer of cybersecurity protection. To educate employees on how to protect their organization by working as securely as possible, financial institutions must implement an effective Information Security Awareness Program. During this presentation, participants will learn the components of an effective Information Security Awareness Program as well as receive practical implementation tips. Topics include program necessity, identifying risks, obtaining management support, drafting a project charter, user training / education, and testing.

MARKETING GROUP

Thursday, September 10  |  2:00 - 3:00 pm
Stop Selling and Start Connecting: Why Your Marketing Program Isn’t Working
Patrick Dix, Vice President of Strategic Alliances - SHAZAM Network

It’s not enough to be your community’s “hometown bank.” It’s more than telling a potential customer it’s “your people” that make the difference. They really don’t care how many years you’ve been in business. It’s time to focus on your story. Information is being delivered faster than ever and the volume can turn to noise if you don’t stop and pay attention. Explore the ways digital media is changing the way we market to consumers, the new ways customers are digesting information, and how you can differentiate your message by connecting with customers through storytelling instead of trying to sell to them.

Thursday, September 10  |   3:00 - 4:00 pm
Supplies and Branding During COVID
Lincoln Dix, Vice President – Supplies Division & Jessica Jenson, Account Manager - Storey Kenworthy

This session will discuss safety measures community banks can use in re-opening their lobbies. From marketing strategies to safety products used by community banks, you’ll learn how to establish a sense of safety through strong corporate branding and identify standards to maximize impact and consistency.
EVENT SCHEDULE

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Kathy Enbom, WIPFLI

3:00 – 4:00 pm  
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I never want to hear again: Re-Assessing Risk during COVID  
Lyle Kolosik, CliftonLarsonAllen

4:00 – 5:00 pm  
Having Tough Conversations in the Workplace  
Jackie Rolow, SHAZAM Network

**September 9, 2020**

9:00 – 10:00 am  
Lending In Today’s COVID Environment: Update on PPP, Loan Forgiveness and More  
Shane Greenleaf, Bankers’ Bank

10:00 – 11:00 am  
Balancing a Tractor: Protecting your risk position while supporting your farmer’s bottom line  
Andy Campbell, Iron Comps

11:00a – 12:00 p  
Having Tough Conversations in the Workplace  
Jackie Rolow, SHAZAM Network

2:00 – 3:00 pm  
Lessons we learned working from home  
Aaron Donaldson, RSM US

3:00 – 4:00 pm  
Safety, Compliance and Business Continuity during a Pandemic  
Emily Pontius, Fredrikson & Byron, P.A.

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Jackie Rolow, SHAZAM Network

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Jackie Rolow, SHAZAM Network

REGISTRATION FEES:

Registration includes admittance to any and all sessions over all 3 event days.

**Individual:**
Registration Fee: $95  
Registration for one attendee.

**Bank Registration:**
Registration Fee: $380  
Register your bank for unlimited attendees.

CLICK HERE TO REGISTER ONLINE NOW

Instructions on how to join the webinar sessions will be given in your registration confirmation email. The login information is valid for all sessions.

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Call the CBI office at 515.453.1495 or email cbia@cbiaonline.org with questions.