



# 2017 Lending Conference

**Co-sponsored by IBANYS & T.Gschwender & Associates**

Marriott Syracuse Downtown  
100 East Onondaga Street  
Syracuse, NY 13202

**May 9-10, 2017**



## Scheduled Speakers

- Robert Giltner, Chairman, RCGILTNER Services, Inc.
- Trevor Knott, Senior Vice President, Business Development, BSG Financial Group
- Bharpur "Bo" Singh, President & Owner, T. Gschwender & Associates
- Bob Scales, Managing Director, CodeFi Solutions
- Tim McPeak, Senior Risk Management Consultant, Sageworks
- Craig Poms, SVP & Bank Partnership Directors, LSQ Funding
- Elizabeth Williams, Managing Director—Special Projects, CEIS Review
- David Brooks, Associate-Membership, Alliance Partners
- David Ruffin, Director, DHG Credit Risk Management
- Dan Crowley, Co-Founder, BankerShare Solutions Group
- John Matheson, Co-Founder, BankerShare Solutions Group
- Karl Nelson, Founder & CEO, KPN Consulting

## OVERVIEW

In today's rate environment and current market conditions, the lending and credit process presents both opportunities and challenges to community banks. Whether the issue is mortgage lending, consumer lending, commercial lending or small business lending, community banks face stiff competition and increased regulatory oversight and compliance mandates. This program is designed to examine some of the lending avenues available to local independent banks, and how they can impact the bottom line.

## Who Should Attend?

- ⇒ **Loan Officers**
- ⇒ **Mortgage Officers**
- ⇒ **Consumer Lending Officers**
- ⇒ **Commercial Lending Officers**
- ⇒ **Credit Officers**
- ⇒ **CFOs & other senior management team members involved in the credit & lending process**

### Earn up to 10 CPE Hours

IBANYS has been authorized by the NYS Department of Education to award continuing professional education (CPE) credits.

# AGENDA

## LENDING CONFERENCE

May 9-10, 2017

Syracuse Marriott  
Downtown  
Syracuse, NY



**Registration Fees:** Includes all course materials and meals

- Member \$495 per person
- Non-member: \$550 per person

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Bank/Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Enclosed is a check made payable to IBANYS \$ \_\_\_\_\_ for \_\_\_\_\_ # of attendee(s)

Please charge my credit card: amount \$ \_\_\_\_\_ for \_\_\_\_\_ # of attendee(s)

Visa/MasterCard number : \_\_\_\_\_

Billing address of card: \_\_\_\_\_

Cardholder Name: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

CVV (last 3 numbers located on back of card) \_\_\_\_\_

**A block of rooms have been reserved at the Marriott Syracuse Downtown.** Reservations can be made by contacting Marriott reservations (800) 228-9290 or by clicking this link: [Book your group rate for Independent Bankers Assoc. of NYS Lending Conference](#)

Refer to group: Independent Bankers Lending Conference. **Room cut-off: April 28, 2017.** (We cannot guarantee room availability and pricing after this date.)

Single/Double rate: \$155 ++

Cancellations must be made **24 hours** prior to day of arrival.

**Have a question?**

**Contact:**

Linda Gregware  
lindag@ibanys.net  
(518) 436-4646

**Registration  
deadline:  
May 3, 2017**

No refunds after  
May 3, 2017

Please send completed registration form to:

Independent Bankers Association of New York State

19 Dove Street, Suite 101, Albany, NY 12210

Fax: 518.436.4648 or email— [lindag@ibanys.net](mailto:lindag@ibanys.net)