



NORTHERN NEW ENGLAND SCHOOL OF BANKING

To: CEOs and Human Resource Officers of
Association Member Banks:
Maine Bankers Association
New Hampshire Bankers Association
Vermont Bankers Association, Inc.

From: Chris D'Elia, Vermont Bankers Association
Kristy Merrill, New Hampshire Bankers Association
Christopher Pinkham, Maine Bankers Association

Date: August 10, 2020

Regarding: Registration, Application and Preliminary Curriculum for the
2020 Northern New England School of Banking

On behalf of the Trustees of the Northern New England School of Banking, we are pleased to announce the Preliminary Program for the 2020 Northern New England School of Banking. The School will run half days from Monday, October 19 through Tuesday, October 27, 2020, and be held virtually via Zoom due to concerns for everyone's safety. **We have gone to outside sources to bring in tools to enhance the virtual experience and offer as many networking and team building sessions as possible.** Hosting the School virtually in 2020 gives people an opportunity to attend who may not have been able to in person.

Once again, our Trustees have developed a timely and meaningful curriculum for the School. Based on both student and trustee evaluations, we retain the highest rated speakers from the previous schools. These speakers also provide the most current content in their area of expertise.

Each year the Trustees also add new segments with new speakers that keep the School current to meet your bank's educational needs and match the ever-changing banking world you compete in! The Northern New England School receives overwhelming support and praise from students, trustees and faculty, as well as bank CEOs and senior banking officers who send their employees.

The Northern New England School is one of the oldest general banking schools in the country, dating back to 1953. The School is geared to supervisors, management trainees or junior officers, but is used by many banks more and more frequently to provide bankers who perform very specific tasks with a broad education about the

Co-sponsors

Maine Bankers Association
207-791-8400

New Hampshire Bankers Association
603-224-5373

Vermont Bankers Association
802-229-0341



NORTHERN NEW ENGLAND SCHOOL OF BANKING

many diverse operations of a bank. The general background training includes the essentials for an introductory school of bank management. The curriculum also focuses on areas of personal development such as self-motivation, adapting to change, and communication skills.

Featured presenters for 2020 include Jack Agati (Motivation and Attitudes); Matt Putvinski (Future of Financial Services); and a CEO Panel with a CEO from Maine, New Hampshire and Vermont. This historically has been one of the highest rated sessions each year with the participants discussing how their bank remains competitive in a global market. There will be core segments on the role of banks in today's economy, the importance of lending, asset liability management, financial statements, bank marketing programs, enterprise risk management, human resource issues and technology in the world of banking.

All students will be expected to complete a written assignment following the session, holding your students accountable for learning some new concepts while attending the School. The School continues to utilize many teaching formats, including lecture, case study, panel presentations, group sessions and workshops. Combined, these sessions expose students to the ideas of many banking industry leaders as well as learn core banking and personal skills.

PLEASE RETURN ALL APPLICATIONS TO THE VERMONT BANKERS ASSOCIATION NO LATER THAN MONDAY, SEPTEMBER 14, 2020!

The School has enjoyed excellent attendance during the past decade, and record attendance the last two years, so respond quickly to assure your student's slot in this year's class. 2020 tuition is \$590 with no room and board cost as it is being held virtually. Our trustees continue to work to deliver a top-notch educational experience at a low price – compared to one- or two-day seminars costing \$600 per day or more.

Students must complete and return the enclosed application for admission. **Students will receive information on accessing the virtual platform, agenda, and other materials about 10 days prior to the School session.**

If you have any questions, please call Chris D'Elia or June Hibbs at the Vermont Bankers Association office 802-229-0341.

SCHOOL CANCELLATION POLICY: A cancellation fee of \$100 will be assessed after September 14, 2020. No refunds are available after September 18, 2020. Replacements will be considered.

Co-sponsors

Maine Bankers Association
207-791-8400

New Hampshire Bankers Association
603-224-5373

Vermont Bankers Association
802-229-0341



NORTHERN NEW ENGLAND
SCHOOL OF BANKING

MONDAY, OCTOBER 19-
TUESDAY, OCTOBER 27, 2020

AGENDA

MONDAY, OCTOBER 19

State Association Host **Chris D'Elia**, *Vermont Bankers Association*

ZOOM PLATFORM

8:00 am – 8:30 am

OPENING SESSION

Christopher D'Elia, *Registrar*

Introduction

Philosophy of the School

Plans for the Session

8:30 am – 9:00 am

INTRODUCTION TO BANKING & OTHER ISSUES

Christopher D'Elia, *Registrar*

History of Banking and Legislation

Forces Impacting the Industry

9:00 am – 9:15 am

BREAK

9:15 am – 10:15 am

ROLE OF YOUR STATE BANKERS ASSOCIATION

Christopher D'Elia, *President, Vermont Bankers Association*

Kristy Merrill, *President, New Hampshire Bankers Association*

Chris Pinkham, *President, Maine Bankers Association*

10:15 am – 10:30 am

BREAK

10:30 am – 11:30 am

BIRTH ORDER: WHAT'S IT GOT TO DO WITH BUSINESS ANYWAY?

Jack Agati, *Encouraging Concepts Associates*

11:30 am – 4:00 pm

BREAK

4:00 pm – 5:00 pm

VIRTUAL RECEPTION WITH ALUMNI



NORTHERN NEW ENGLAND
SCHOOL OF BANKING

MONDAY, OCTOBER 19-
TUESDAY, OCTOBER 27, 2020

AGENDA

TUESDAY, OCTOBER 20

State Association Hostess **Kristy Merrill**, *New Hampshire Bankers Association*

ZOOM PLATFORM

8:00 am – 9:00 am **ECONOMIC DEMOGRAPHICS**
Brian Gottlob, *PolEcon Research*

9:00 am – 9:15 am **BREAK**

9:15 am – 9:25 am **MORNING SHARE – small group breakout**

9:25 am – 10:25 am **FRAUD, CYBERCRIME, SECURITY**
John H. Rogers, *CISSP, MonarchISC, LLC*

10:25 am – 10:40 am **BREAK**

10:40 am – 11:55 am **ERM, CRA & COMPLIANCE**
Carol Bailey, *Internal Auditor*
Piscataqua Savings Bank



MONDAY, OCTOBER 19-
TUESDAY, OCTOBER 27, 2020

NORTHERN NEW ENGLAND
SCHOOL OF BANKING

AGENDA

WEDNESDAY, OCTOBER 21

State Association Host **Chris Pinkham**, *Maine Bankers Association*

ZOOM PLATFORM

8:00 am – 9:00 am

FROM SUPERVISION TO LEADER

David Ciullo, *CEO, Career Management Associates*

9:00 am – 9:10 am

BREAK

9:10 am – 10:10 am

FROM SUPERVISION TO LEADER *(continued)*

David Ciullo, *CEO, Career Management Associates*

10:10 am – 10:20 am

BREAK

10:20 am – 11:20 am

FROM SUPERVISION TO LEADER *(continued)*

David Ciullo, *CEO, Career Management Associates*

11:20 am – 3:30 pm

BREAK

3:30 pm – 5:00 pm

(90 minutes needed)

GO GAME VIRTUAL TEAM BUILDING & NETWORKING EVENT

Be sure to see page for tech requirements to be able to join the game and have a great time!



MONDAY, OCTOBER 19-
TUESDAY, OCTOBER 27, 2020

NORTHERN NEW ENGLAND
SCHOOL OF BANKING

AGENDA

THURSDAY, OCTOBER 22

State Association Hostess **Chris D'Elia**, *Vermont Bankers Association*

ZOOM PLATFORM

8:00 am – 9:15 am **BANK FINANCIAL STATEMENTS/ROLE OF THE CFO**
Tom Zuke, Executive Vice President/ Chief Financial Officer & Treasurer
Kennebunk Savings Bank

9:15 am – 9:30 am **BREAK**

9:30 am – 10:00 am **ASSET LIABILITY MANAGEMENT**
Tom Zuke, Executive Vice President/ Chief Financial Officer & Treasurer
Kennebunk Savings Bank

10:00 am – 10:15 am **BREAK**

10:15 am – 11:45 am **CEO PANEL DISCUSSION**
Tony McKim, President & CEO, First National Bank
Linda Lorden, President, Merrimack County Savings Bank
David Silverman, President & CEO, Union Bank

11:45 am – 4:00 pm **BREAK**

4:00 pm – 5:00 pm **NETWORKING – INDUSTRY CHALLENGE
DISCUSSION**
**COVID-19 – What has your bank been doing to meet the needs of
its customers, handle personnel, plan for the future, and other
items related to getting through the pandemic.**



MONDAY, OCTOBER 19-
TUESDAY, OCTOBER 27, 2020

NORTHERN NEW ENGLAND
SCHOOL OF BANKING

AGENDA

FRIDAY, OCTOBER 23

State Association Host **Kristy Merrill**, *New Hampshire Bankers Association*

ZOOM PLATFORM

8:00 am – 9:30 am **FUNDAMENTALS OF LENDING**
(Includes Time for Case Study Analysis)

TBD

TBD

9:30 am – 9:45 am **BREAK**

9:45 am – 9:55 am **MORNING SHARE – small group breakout**

9:55 am – 10:55 am **THE FUTURE OF FINANCIAL SERVICES**

Matt Putvinski, CPA, CISA, CISSP

Wolf & Company, P.C.

10:55 am – 11:10 am **BREAK**

11:10 am – 12:10 pm **HUMAN RESOURCE ISSUES IMPACTING MANAGERS**

Anne Jenness, Attorney

Gallagher, Callahan & Gartrell, PC



MONDAY, OCTOBER 19-
TUESDAY, OCTOBER 27, 2020

NORTHERN NEW ENGLAND
SCHOOL OF BANKING

AGENDA

MONDAY, OCTOBER 26

State Association Host **Chris Pinkham**, *Maine Bankers Association*

ZOOM PLATFORM

8:00 am – 9:00 am **MARKETING FOR THE FUTURE**
Linda Varrell, Broadreach Public Relations

9:00 am – 9:15 am **BREAK**

9:15 am – 10:15 am **THE ART OF MOTIVATING OURSELVES AND OTHERS**
Jack Agati, Encouraging Concepts Associates

10:15 am – 10:30 am **BREAK**

10:30 am – 12:00 pm **BUSINESS DEVELOPMENT: ACQUIRING, RETAINING
AND ATTRACTING CUSTOMERS**
Chantal Upton, Vice President/Sales & Training Manager
First Seacoast Bank

12:00 pm – 4:00 pm **BREAK**

4:00 pm – 5:00 pm **NETWORKING – INDUSTRY CHALLENGE
DISCUSSION**
TBD



NORTHERN NEW ENGLAND
SCHOOL OF BANKING

MONDAY, OCTOBER 19-
TUESDAY, OCTOBER 27, 2020

AGENDA

TUESDAY, OCTOBER 27

State Association Host **Chris D'Elia**, *Vermont Bankers Association*

ZOOM PLATFORM

8:00 am – 9:15 am **PUBLIC SPEAKING**
Cristy Beemer, *University of New Hampshire*

9:15 am – 9:130 am **BREAK**

9:30 am – 11:00 am **WRITTEN COMMUNICATION SKILLS**
Cristy Beemer, *University of New Hampshire*

11:00 am – 11:15 am **ASSIGNMENTS AND WRAP UP**



NORTHERN NEW ENGLAND
SCHOOL OF BANKING

2020 SESSION VIA ZOOM

APPLICATION FOR ADMISSION

FIRST NAME		LAST NAME	
BANK NAME			
BANK MAILING ADDRESS			
CITY		STATE	ZIP
PHONE – WORK		PHONE – HOME or CELL <i>(only used in case of emergency)</i>	
WORK EMAIL			
HR MANAGER NAME & BANK ADDRESS			
HR MANAGER EMAIL			

EDUCATION

SCHOOL/COLLEGE	DATES ATTENDED	DEGREE/CERT	YEAR

EMPLOYMENT

PRESENT POSITION/TITLE		# YEARS IN PRESENT POSITION	
RESPONSIBILITIES			
TOTAL NUMBER OF YEARS EXPERIENCE WITH FINANCIAL INSTITUTIONS			
NUMBER OF EMPLOYEES REPORTING DIRECTLY TO YOU			

CONTINUED ON NEXT PAGE



NORTHERN NEW ENGLAND
SCHOOL OF BANKING

2020 SESSION VIA ZOOM

APPLICATION FOR ADMISSION

INPUT

Please list any industry hot topics that are of interest to you in your job and career. One or more may be used in networking sessions.

ATTENDANCE

Attendance at all sessions is mandatory as none of the session will be recorded. Some sessions are more interactive than others and we have shortened some of the sessions to account for the virtual nature of the gathering.

TECHNOLOGY REQUIREMENTS

Although you can use a tablet or smartphone to access Zoom, we strongly suggest a laptop or PC as some sessions are more interactive than others and there is one event specifically that requires a laptop or PC and headphones to participate.

FEE ENCLOSED

TUITION - \$	per person	\$
TOTAL ENCLOSED		\$

SIGNATURE

DATE

Please mail with tuition check payable to:

Northern New England School of Banking
c/o Vermont Bankers Association
P.O. Box 587, Montpelier, Vermont 05601
Tel: 802-229-0341 Fax: 802-223-5078

All applications must be received **NO LATER THAN MONDAY, SEPTEMBER 14, 2020**. Once received a confirmation email will be sent. Information on accessing the virtual platform, agenda, and other materials will be emailed about 10 days prior to the start of the school session.

SCHOOL CANCELLATION POLICY: A cancellation fee of \$100 will be assessed after September 14, 2020. No refunds are available after September 18. Replacements will be considered.