



Education



Community Bankers
Association of Kansas

Family Bank Institute

May 13-14, 2010; Branson, MO

Topics Include:

- Succession planning and management development
- Subchapter S planning issues
- Dynamics of the family business
- Estate planning
- Strategic planning

Proper planning can better prepare privately-held bank owners and executives to fully realize the benefits and ongoing challenges of this business model from one generation to the next. This program is designed to preserve and enhance the role of family-owned and closely held community banks by providing an educational framework to address planning needs unique to privately held banks and their owners to ensure success over multiple family generations.

Schedule:

Day One 8:30 am to 4:15 pm
4:15-5:30-Private consultations available by appointment
5:30 to 6:30 p.m. – Reception

Day Two 8:30 am to Noon
All materials will be provided. Lunch and reception will be included on Day One.

Speakers:

Jeffrey C. Gerrish is Chairman of the Board of the consulting and law firms of Gerrish McCreary Smith.

Philip K. Smith is President of the consulting and law firms of Gerrish McCreary Smith.

Bill Reid is President/CEO of ICBA Financial Services Corp.

Richard Dunn is Principal of Dunn and Associates.

Philip J. Toffel is CEO of Sage Hill Advisory & Management.

Frank Antalek is President of Sage Hill Advisory & Management.

Thomas W. Robb is a Regional Specialist in family business planning for Sage Advisors (a Sage Hill subsidiary)

Who Should Attend:

Owners, shareholders, involved family members

Hotel Information:

- To make your hotel reservation, contact the **Hilton Branson Convention Center Hotel** at (417) 336-5400. To secure the negotiated rate of \$120 for this program, you must make your hotel reservation by 4-21-10.
- For special assistance needs, please call the ICBA Education Department at (800) 422-7285.

Independent Community Bankers of America (ICBA) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to NASBA, 150 Fourth Avenue North, Suite 700, Nashville, TN Web site: www.nasba.org

Prerequisites - No previous experience and training is necessary.

9 CPE Credits Delivery Method: Group-Live
Program level: Basic-Intermediate

Registration Information:

Applicant's Name (Mr. Mrs. Ms.) _____ Badge Name _____

Current Title at Bank _____

Sponsoring Bank (or Bank Client) _____

Mailing Address _____

City _____ State _____ Zip _____

Telephone (Area Code and Number) _____ Fax Number _____

E-mail _____

Fees:

	ICBA Member	Nonmember
First Registrant:	\$595	\$795
Each Additional:	\$295	\$395
Max per Bank:	\$1,500	\$2,500

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*Nonmembers may apply \$200 of the registration fee to an annual membership in ICBA

- A check payable to ICBA is enclosed
- Charge to my VISA MasterCard American Express Discover

Credit Card Account No. _____ Expiration Date _____

Signature _____

Refund Policy: If registration is canceled more than 30 days prior to the seminar, you will receive a full refund. If cancellation is within 30 days of the seminar, 20 percent of the fee will be deducted for costs. No refund for registrations canceled after beginning of seminar.

Send or Fax Registration To:

ICBA Education Dept, P.O. Box 267, Sauk Centre, MN 56378
Online: www.icba.org/education
Fax: (320) 352-5366 Phone: (800) 422-7285, ext. 7334
E-mail: Education@icba.org