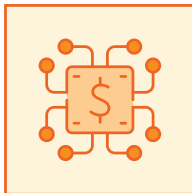
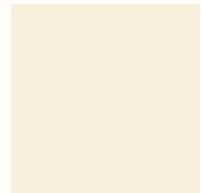
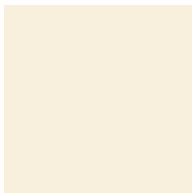
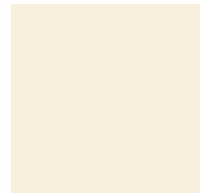
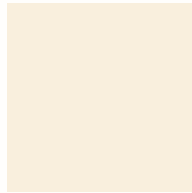
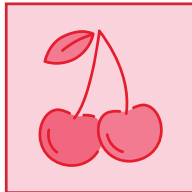
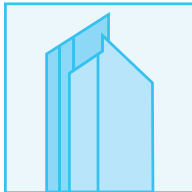


Bankers Education Summit and Trade Show

# BEST CONFERENCE



**May 11-13**  
Grand Traverse Resort & Spa  
Traverse City

## WHERE THE BEST IDEAS BECOME REAL IMPACT.

MBA welcomes you to the Bankers Education Summit and Trade Show (BEST)! This is your BEST opportunity to connect with fellow bankers from around the state. We've designed this year's conference with ample time for sharing and learning from one another. Participate in roundtable discussions, engage at our trade show, discover new product ideas, and hear about successful new initiatives from other bankers.

### KEYNOTES

Tuesday, May 12

8:00 - 9:30am | Governors Hall

#### Opening Keynote and Breakfast

**If You Can't Say It, You Don't Own It: How  
Community Banks Tell a Story That Sticks**

*Amber Farley, EVP, Brand Development, Financial  
Marketing Solutions*



Sponsored by:



Noon - 1:30pm | Governors Hall

#### Lunch Keynote

**Laughter is the BEST Medicine**

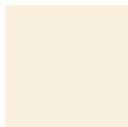
*Danny Adams, The Facilitator of Fun*



Sponsored by:



Graduate School of Banking  
at the University of Wisconsin - Madison



# AT A GLANCE

## Monday, May 11

Noon - 6:00 p.m. | Governors Hall  
**Exhibitor Set-up**

Noon | Front Lobby  
**Registration Open**  
Sponsored by Forvis Mazars

1:00 p.m.  
**Activities Depart Front Lobby**  
Skeet Shooting  
Wine Tasting and Tour: Chateau  
Chantal and Bonobo Winery  
Both return at 4:00 p.m. to resort.

1:00 p.m. | Meet at The Bear  
**Golf Outing 18 holes**

6:00 - 7:00 p.m. | Governors Hall  
**Welcome Reception**  
Sponsored by InfoTrust Corporation

## Tuesday, May 12

6:30 - 7:00 a.m. | Meet in Lobby  
**Sunrise Walk**

8:00 - 9:30 a.m. | Governors Hall  
**Breakfast and Opening Keynote  
Featuring Financial Literacy  
Awards**  
Sponsored by MSHDA;  
Lenderful Solutions

9:30 a.m.  
**Trade Show Opens -  
Coffee and Stretch Break**  
Sponsored by Creatio  
*Bring your bingo card for chances to  
win. Try your chance at the ring toss!*

10:00 - 11:50 a.m.  
**Breakout Sessions**

Noon - 1:25 p.m. | Governors Hall  
**Lunch and Keynote Featuring  
Scholarship Awards**  
Sponsored by GSB - Madison

1:30 - 2:30 p.m.  
**Breakout Sessions**

2:30 - 3:00 p.m. | Trade Show Floor  
**Refreshments and Afternoon  
Stretch**  
Sponsored by Aanalytics

3:00 - 4:00 p.m.  
**Breakout Sessions**

4:00 - 5:30 p.m.  
**Happy Hour with Live Music**  
Sponsored Thompson-Phelan Group

**Be sure to visit the selfie-station!**  
Sponsored by Diebold Nixdorf

**Evening on Your Own to Explore  
Traverse City**

8:30 p.m. | Directors Room,  
Lobby Level  
**Afterglow and Euchre Play**  
Sponsored by PCBB

## Wednesday, May 13

8:00 a.m. | Trade Show Floor  
**Breakfast Buffet**  
*Bring your completed bingo card.  
Don't oversleep! Must be present to  
win. Drawings start at 8:30 a.m.*

9:00 - 10:30 a.m.  
**Breakout Sessions**

**Adjourn**

## LEARNING SESSIONS

### Retail Lending Track | Tower B

#### May 12

10:00 - 10:50 a.m.

#### AI Use in Lending

*Jim Perry, Market Insights*

11:00 - 11:50 a.m.

#### Responsible Credit Expansion

*Mark Anderson and Keith Marvel,  
HUB International*

1:30 - 2:25 p.m.

#### Legal Update

*Melissa Bridges, Bodman*

3:00 - 4:00 p.m.

#### Construction Loans

*Katrina Asman, Independent Bank*

#### May 13

9:00 - 9:45 a.m.

#### Regulations

*Amy Durant, Dykema*

9:45 - 10:30 a.m.

#### Fraud Trends

*Stuart Best and Dan Best, Weltman*

### Human Resources Track | Peninsula A

Sponsored by Michigan Planners, Inc.

#### May 12

10:00 - 10:50 a.m.

#### HR Jeopardy. I'll Take ADA for \$1,000

*John Gardiner, Bodman*  
SHRM Activity 26-SEZ7H

11:00 - 11:50 a.m.

#### Peer Roundtables - Bring Your BEST Ideas

1:30 - 2:30 p.m.

#### Compensation Data and Developing Salary Grades

*Matt Brei, Blanchard Consulting*  
SHRM Activity 26-WY9JR

3:00 - 4:30 p.m.

#### BEST Ways to use AI in HR and Navigating Risk

*Scott Carvo, WNJ; Paul Martson, HR  
Performance Solutions*  
SHRM Activity 26-ZAVKA

#### May 13

9:00 - 9:45 a.m.

#### Multi-Generational Workplaces

*Jean Holthaus, PineRest*  
SHRM Activity 26-4PDMH

9:45 - 10:30 a.m.

#### Cost Containment Solutions: Proven Strategies for Reducing Benefits Spend

*Kurt Swartz, Michigan Planners Inc.*  
SHRM Activity 26-6X9PV

## Commercial Lending Track - Tower C

Sponsored by MCDC

### May 12

10:00 - 10:50 a.m.

#### SBA in Motion - How Recent SBA Changes Impact Opportunities

*Steve Pricco and Eric Kehler, MCDC;  
Cindy Wichern, Independent Bank*

11:00 - 11:50am

#### Economic Update

*Andrea Lisi, CFA, Lisi Quant Analysis*

1:30 - 2:30pm

#### Bank Let's Talk Regulations!

*Dan Keimig and Blake Boedecker, DIFS*

3:00 - 4:00 p.m.

#### Peer Roundtables - Bring Your BEST Ideas

### May 13

9:00 - 9:45 a.m.

#### Special Assets

*Stuart Best, Weltman*

9:45 - 10:30 a.m.

#### Current Credit Trends and Early Warning Indicators

*Andrew Harper, Forvis Mazars*

## Marketing Track - Mackinac A

### May 12

10:00 - 10:50 a.m.

#### Social Media Challenges and Tools to Engage Commercial Lenders

*Allyson Twiggs, The Twiggs Group*

11:00 - 11:50 a.m.

#### Wearing So Many Hats! How to Stay Organized

*Mashaun Schabloski,  
Century Bank and Trust*

1:30 - 2:30 p.m.

#### Media Campaign Strategies

*Dan DeWaal, Galapagos Marketing;  
Eric McKinney, Eaton Community Bank*

3:00 - 4:00 p.m.

#### Remodels, Rebranding and More!

*Jeff McCarthy, Bank Five Nine*

### May 13

9:00 - 9:45 a.m.

#### Determining ROI and Impact of a Campaign

*Jim Pannos, Pannos Marketing*

9:45 - 10:30 a.m.

#### AI and Marketing

*TBD, LinkLive*



## Customer Service/Sales Track - Tower A

### May 12

10:00 - 10:50 a.m.

#### State of the Retail Banking Industry

*Robb Rempel, Haberfeld*

11:00 - 11:50 a.m.

#### Evolution of Check Fraud Will it Continue to Increase?

*Brian Hoffman, Finovifi*

1:30 - 2:30 p.m.

#### Banking on AI: Hype, Hope, or Help?

*Will Mayfield, Aunalytics*

3:00 - 4:00 p.m.

#### From Data to Decisions: Winning Michigan Consumers

*Brett Christie, MLive*

### May 13

9:00 - 9:45 a.m.

#### Motivate Your Branch Team to Build Stronger Client Relationships

*Jack Kasel, Anthony Cole Training*

9:45 - 10:30 a.m.

#### Tools to Provide Superior Service

*Kevin Lounds, Lighthouse Title Group*

## Operations and Technology Track

### May 12

10:00 - 10:50 a.m.

#### Secure IT Hardware Disposal Best Practices and Compliance

*Mark Hudson, TechDefenders*

11:00 - 11:50 a.m.

#### Beyond the Perimeter: On-Prem vs. Cloud Firewall Strategies

*Justin Heck; Anthony Lombardo, Plante Moran*

1:30 - 2:30 p.m.

#### Unlock Value and Drive Efficiencies with Cash Automation

*Freddie Raphael and Tim Hoover, Diebold Nixdorf*

3:00 - 4:00 p.m.

#### Can Microsoft 365 be Secure?

*Indio Hubbarth, LASCO*

### May 13

9:00 - 9:45 a.m.

#### Fraud: Current Events and Reg E Expectations

*Natalie Straus, Forvis Mazars*

9:45 - 10:30 a.m.

#### The Evolving Risk Landscape: How Physical Security Intelligence Strengthens

#### Fraud Prevention

*Gloria Lubben, SecurAlarm*

## Handouts

All handouts are posted on the mobile app and michigan.bank/best

## Photo Release

MBA uses photographs from events in its promotional materials. Unless this permission is revoked in writing to MBA, by virtue of your attendance, all conference visitors agree to the use of such materials.

## MobileApp

Download the BEST Conference mobile app by searching mibankers in your app store. View the agenda, handouts, find an exhibitor, etc. all on the go! **Daily Challenge - upload your pics!**

## BEST Bingo

Drop your completed card off at the MBA Registration Desk by Wednesday at 8:00am. Must be present to win. Bankers only. Thanks to many of our exhibitor and sponsor partners who provided these great prizes!

## Thank you

Thank you to our committee member volunteers for planning this conference. To join a committee or peer forum, please connect with an MBA Team Member for more information.

## Financial Literacy Awards

MBA recognizes Michigan banks who have shown exceptional dedication, innovation and commitment to financial literacy. Join us to honor our recipients at Tuesday's breakfast.

## Ring Toss

Step right up and take your shot! Our ring toss game is the perfect quick break from the conference buzz—fun, fast, and surprisingly addictive. Swing by, test your aim, and you could walk away with some great prizes. It only takes a minute to play, but the bragging rights last all day.

## Continuing Education

American Bankers Association (ABA) Professional Certifications has approved



2026 Bankers Education Summit and Trade Show (BEST) for: **6.5 CERP, CFMP, CAFP, CRCM** credit. APPROVED NON-ABA CE search for training will appear as: Michigan Bankers Association | 2026 Bankers Education Summit and Trade Show (BEST)

SHRM Provider I.D. **RP2608** (Michigan Bankers Association). See specific HR Track sessions for details.



# THANK YOU SPONSORS

aunalytics **BANKERS' BANK** **Creatio**



**SAVE THE DATE**  
April 14 - 16, 2027

## THANK YOU EXHIBITORS

*as of 4/26*

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|-------------------------------------|--|-----------------------------------|
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| Ascensus                            | Informa Business Systems Inc.                | RedRock Information Security, LLC |
| Aunalytics                          | Infotex Inc.                                 | Rehmann                           |
| Bankers' Bank                       | Infotrust Corporation                        | The Federal Reserve               |
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| FIPCO                               | PWCampbell                                   | Weltman Weinberg & Reis Co LPA    |
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| GSB - Madison                       |  |                                   |