CALLING ALL EXPERTS!

FMS Now Accepting Submissions for Speaking Opportunities at The 2015 Finance & Accounting Forum

JUNE 14-16, 2015 • SCOTTSDALE, AZ • THE PHOENICIAN
Explore New Horizons

The Financial Managers Society invites you to join us as we explore new horizons! Share your knowledge and expertise with colleagues and friends at The Finance & Accounting Forum for Financial Institutions, June 14-16, 2015 in Scottsdale, Arizona, the most exclusive event attracting hundreds of executives and decision makers from community banks, thrifts and credit unions across the continent.

The Forum is the perfect event for an expert, like you, to share your insights with a targeted audience of industry decision makers. Submit your presentation ideas today and capitalize on this unmatched opportunity to enhance your professional profile and network with the financial institutions industry’s most influential executives!

Speaker Benefits

Visibility
Benefit from exposure and marketing of your session to FMS’ network of over 16,000 financial executives.

Credibility
Your association with The Forum and FMS connects you with one of the most trusted resources in the financial institutions industry.

Networking
Access to our unique mix of education and social events makes it easy to build key relationships with our qualified audience.

Value
Speakers at The Forum enjoy complimentary full-conference access to our excellent educational and social events.

Recognition
Become a valued resource and contributor to the growth of your profession and the financial institutions industry as a whole.

Who Will You Meet?

<table>
<thead>
<tr>
<th>Attendees by Job Function*</th>
<th>Attendees by Institution Type*</th>
<th>Attendees by Institution Asset Size*</th>
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<tbody>
<tr>
<td>30% CFO</td>
<td>58% Commercial Bank</td>
<td>3% Less than $100 Million</td>
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<tr>
<td>14% Accounting/Finance</td>
<td>17% Thrift/OTS Savings Bank</td>
<td>$100 Million – $249 Million</td>
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<td>13% Controller</td>
<td>24% Credit Union</td>
<td>$250 Million – $499 Million</td>
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<tr>
<td>10% Internal Auditing/Risk Mgmt</td>
<td>25% $500 Million – $999 Million</td>
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<td>8% Partner/Principal/Mgr</td>
<td>20% $1 Billion - $4.99 Billion</td>
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<td>4% CEO/President</td>
<td>17% $5 Billion - $9.99 Billion</td>
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<tr>
<td>4% Treasurer/Investment Officer</td>
<td>2% $10 Billion or Greater</td>
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<td>3% Consultant</td>
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<td>2% Operations</td>
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<td>2% Financial Analyst</td>
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<tr>
<td>6% Other</td>
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* Based upon paid attendance at The 2014 Finance & Accounting Forum in Orlando, Florida.

To submit a proposal visit www.fmsinc.org/2015Call
Suggested Topics

The Forum consistently delivers the most comprehensive content in the industry and this year will be no exception. The following is a menu of suggested topics that were identified by FMS’ four Advisory Councils as key areas for discussion at the 2015 event. **Other topics may be proposed, but priority will be given to the following topics.**

**Accounting: 2015 Session Topics**

1. Best Practices for tracking deferred tax items
2. Best practices in ALLL/FASB/IASB Financial Instruments Project: How to prepare for CECL
3. Benefits accounting: SERPs, pensions, BOLI and compensation arrangements
4. FASB/IASB Project: Fair Value Measurement – Guidance and best practices
5. Accounting for mergers and acquisitions: Day 2 accounting
6. Strategic responses to current and pending tax issues
7. FASB Lease Accounting Proposal: Status of proposal (implementation guidance if finalized)
8. The 2015 Call Report: New requirements and common pitfalls
9. BASEL III: Accounting and financial reporting implications
10. The new FASB Revenue Recognition and how it will impact financial institutions
11. Best practices on right-sizing accounting departments

**Finance: 2015 Session Topics**

1. Basel III: Effective transition to the new requirements
2. Best Practices in ALM model assumptions and documentation
3. Creation and implementation of effective ALM policies and procedures
4. How to develop and maintain a liquidity contingency plan
5. Back testing your ALM model: Best practices in validation and verification
6. Non-agency securities: Appropriate due diligence strategies that meet regulatory mandates
7. Comprehensive stress-testing: Integrating stress-testing enterprise-wide
8. Understanding the value and use of EVE and NEV
9. Derivatives 101: Hedging opportunities using simple derivatives—swaps and caps
10. Understanding alternative funding sources
11. Profitability management including funds transfer pricing

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Suggested Topics (continued)

**Risk Management/Internal Audit: 2015 Session Topics**

1. How to audit stress-testing of capital and liquidity including sensitivity and assumptions
2. Auditing Model Risk Management
3. Auditing contingency funding and liquidity plans
4. Auditing cyber risks including IT and mobile banking
5. Best practices on incident response management
6. Auditing vendors to ensure sound practices
7. How auditing BSA compliance is evolving with an emphasis on smaller institutions
8. Auditing Mortgage Quality Control for origination, servicing, and estimating re-purchased loans
9. Latest fraud trends
10. Implementation challenges for COSO 2013 changes
11. How to structure ERM and internal audit to avoid conflict of interest
12. Improving the internal audit function to add value and retain employees
13. How to audit/evaluate the Compliance Risk Management function

**Strategic Issues: 2015 Session Topics**

1. Mobile pay solutions: Which makes the most sense for my institution?
2. New technologies: Evolving from branch model to mobile electronic model
3. Strategies to reduce regulatory compliance overhead
4. Generating and maintaining fee income opportunities
5. Regulations on compensation trends for lending staff
6. Best practices in executive compensation and retirement plans
7. Raising capital: What is enough capital in a post-Basel III environment?
8. Board communication: What is the right amount to appease regulators?
9. Mergers and acquisitions: The strategic process and use of metrics in the decision-making process
10. Top five threats to institutions’ survival for the future
11. Redefining your institution’s culture
12. Succession management for smaller or family institutions

To submit a proposal visit www.fmsinc.org/2015Call
How to Apply
To submit a proposal for consideration at The 2015 Finance & Accounting Forum, please visit our online submittal system at http://www.fmsinc.org/2015Call. Potential speakers may submit a maximum of three topic proposals.

Application Deadline
All applications must be submitted no later than December 8, 2014 for consideration. All applications must be submitted in the speaker’s name.

Notification
A task force comprised of member of FMS’ four Advisory Councils will review applications and select speakers immediately after the December 8, 2014 application deadline. All speakers who submit a proposal will be contacted in January 2015 regarding the final decisions.

Speaker Obligations
If your presentation is selected, you are required to:

• Submit your photo, biography, presentation and AV support requirements by the deadline date, Friday, May 19, 2015 (30 days prior to conference).
• Agree to present educational material only.
• Allow FMS to post copies and distribute your final presentation online and on the conference mobile app before and after the conference.

Application Guidelines

Quality Standard
FMS maintains a standard of excellence for speakers. We are seeking presentations that are timely, relevant to attendees, practical in application and that will advance the educational enrichment and professional development of FMS members. Topics must be educationally focused, non-competitive, exclude pricing issues and presented without evident commercial bias. No commercial sales pitches, self-promotion or unwarranted criticism of a competitor is accepted.

Qualifications
Selection of speakers is based on careful consideration of the topic being presented, professional and banking experience, education, previous presentations in topic area, ability to simply communicate complex topics, and participant evaluations of presenter(s) at previous FMS engagements (if applicable).