40th Annual Graduate School of Bank Investments and Financial Management
America’s Premier Financial Program for Community Bankers

May 14-18, 2016

GBIFM is designed to provide a hands-on educational experience in the areas of investment instruments, interest rate risk modeling, enterprise risk management, bond portfolio management, liquidity and funding analytics, and regulatory requirements. Participants will learn how to use Bloomberg information to make informed investment decisions and will critique how to respond to the impact of rising interest rates on their organizations’ financial performance. The target audience is finance professionals at community banks and bank regulatory agencies.

Attendees will gain practical insights and evaluate strategic responses to issues in the following areas:

- Different investment instruments (Treasuries, Agencies, Mortgage-backed securities, Municipals and Corporates)
- Portfolio strategies in the current environment and in a rising rate environment
- How different securities are priced
- Uses and abuses of Bloomberg information
- Conducting effective enterprise risk management implementation (internal risk assessments)
- Beta and decay analysis of different funding sources
- Regulatory emphasis on interest rate risk and liquidity risk management
- Interest rate risk modeling
- Effective corporate governance practices
- Hedging interest rate risk (use of swaps, caps, floors)

Faculty members are leading financial professionals who manage portfolios, serve as brokers, and offer capital markets consulting services. Attendees will participate in several case studies related to managing a bank’s aggregate interest rate risk, constructing a meaningful investment portfolio in relation to the bank’s balance sheet structure and risk management objectives, and assessing liquidity risk.

Participants qualify for approximately 40 hours of Continuing Professional Education (CPE) credits.

Size of banks represented at 2015 GBIFM (assets)

- <100 Million: 5%
- 100 to 300 Million: 18%
- 300 to 500 Million: 18%
- 500 Million to 1 Billion: 41%
- >1 Billion: 18%

Register Now!
Earlybird Rate: $2,795 (before January 15, 2016)
$2,995 after January 15, 2016

For detailed information and registration:
learnmoore.com
SPECIAL FEATURES
Participants will analyze specific investment products, interest rate risk models, deposit retention strategies, capital strategies and the search for earning assets. An introductory session addresses how brokers use and abuse Bloomberg in their communications with investors. Other sessions emphasize practical applications and case studies including the interpretation of pricing, duration and spread information and application to investment and portfolio decisions. The emphasis is on using information to make strategic decisions. Participants will operate a bank as part of a team in a competitive simulation (BANKdynamics™) that emphasizes ALM.

Participants can choose between two levels of Investment Analytics:
1. Introduction to Investment Instruments and Strategies
2. Advanced Investments Analytics

COURSE TOPICS INCLUDE:
- High Performance Community Banks
- Investment Instruments
- Case Studies
- Constructing a Bond Portfolio
- Effective Portfolio Management
- Asset and Liability Management
- Liquidity Analysis/What Deposits are Truly Core?
- Regulatory Update
- Bloomberg Analysis
- Interest Rate Swaps, Caps and Floors
- Bank Dynamics: A Simulation
- Strategic Planning and Stress Testing
- Comprehensive Enterprise Risk Management (ERM)

FACULTY LEADERS
Tim Koch
Academic Director
University of South Carolina
Darnell Canada
Darling Consulting Group
Ed Krei
The Baker Group, LP
Scott Martorana
FinPro, Inc.
Mark Mershon
National Penn Bancshares, Inc.
Christopher Nelson
Bangor Savings Bank
Karl Nelson
KPN Consulting
Brad Olson
Olson Research Associates
Todd Taylor
Taylor Advisors, Inc.
Randy Woodward
Raymond James Financial

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