



**CONSUMER
BANKERS
ASSOCIATION**



2024-2025 CBA Associate Member & Sponsor Prospectus

Upcoming Key Dates

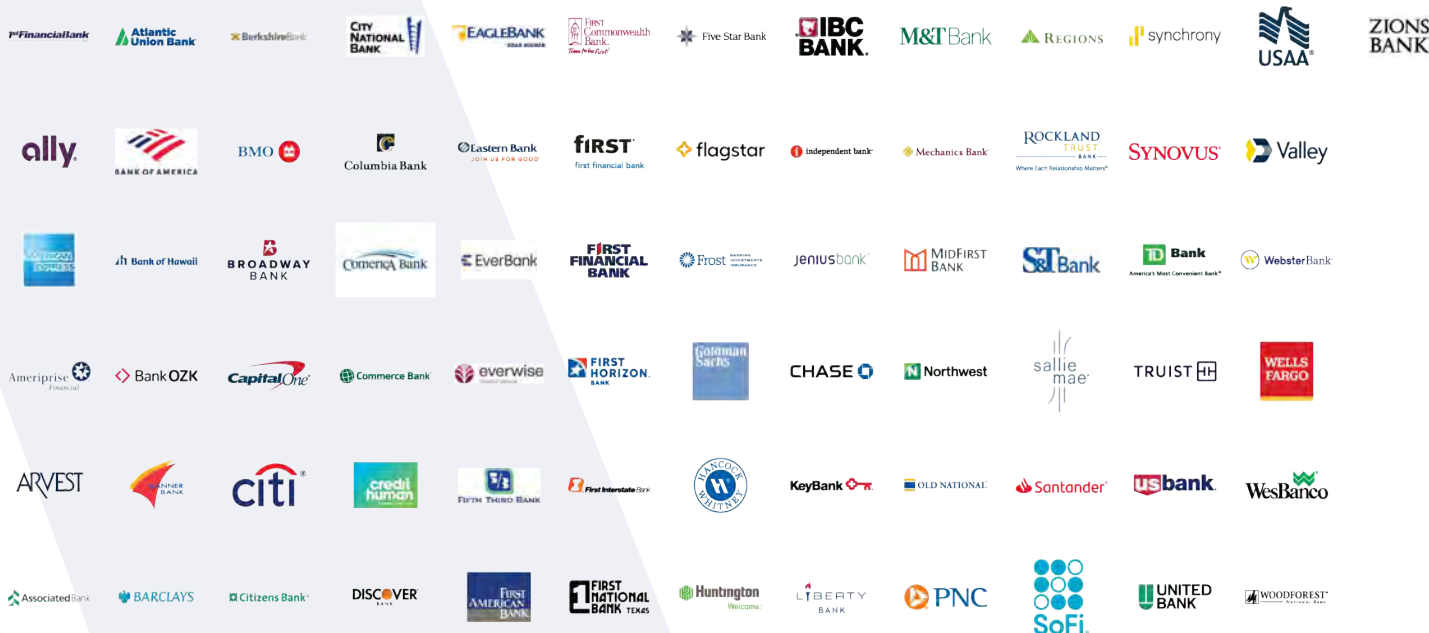
- + **Fall Committee Summit, McLean VA**
September 30 - October 1, 2024
- + **CBA LIVE 2025, Orlando FL**
March 17 - 19, 2025
- + **Executive Banking School, Greenville SC**
July 20 -30, 2025
- + **Evergreen Sponsorships for FY2025**
October 1, 2024 - September 30, 2025



Sponsorships are exclusively for members of the Consumer Bankers Association.

Not a member?

Sign up today to start enjoying all that CBA has to offer and gain access to the valuable business development opportunities showcased in this prospectus. To join or learn more, call or email Kevin O'Connor at (202) 552-6376 or koconnor@consumerbankers.com



Members

- + CBA's Corporate Members include the nation's largest financial institutions as well as regional and online banks, with 85% holding more than \$10 billion in assets.
- + Our Associate Members include premier suppliers and providers of goods and services to the retail banking industry.

Quick Facts

- + Collectively, CBA member banks: 73
- + Employ 1.7 million full time employees.
- + Serve 144 million Americans
- + Total \$14.5 trillion in assets, or about 79% of all holding company, bank and thrift assets in the U.S.
- + Have extended \$3.3 trillion or 75% of all consumer loans and \$305 billion in small business loans.

About CBA

The Consumer Bankers Association stands apart from other bank trade associations by focusing on retail banking. CBA has provided insight and analysis, advocacy, education, and networking opportunities to the industry for more than 100 years. In today's heightened regulatory environment, CBA is your go-to for the issues that impact you most.

Our committees are the backbone of CBA. Totalling over 600 bankers, including top executives, these members are experts in their specific product or line of business at their financial institutions

CBA Committees include:

- + Automobile Finance
- + Branch Banking
- + CFPB
- + Community Reinvestment
- + Default Management
- + Deposits and Payments
- + Digital Channels
- + Education Funding
- + Fair & Responsible Banking
- + Fraud Management
- + Home Equity Lending
- + Internal Audit
- + Risk Management
- + Small Business Banking
- + Talent Management

Working Groups:

- + Artificial Intelligence
- + Section 1071
- + Section 1033
- + BSA/AML
- + Buy Now, Pay Later
- + Consumer Complaints
- + Credit Cards
- + Credit Risk
- + Digital Payments
- + Government Representatives
- + HMDA
- + Home Equity - Product
- + Home Equity - Risk
- + Home Equity - Underwriting/Fulfillment
- + Lawyers
- + Marketing
- + Overdraft
- + Privacy/Data Security
- + Regulatory Advisory Group
- + Small Dollar Lending Group

In-person Committee Meetings

Fall Committees Summit

All meetings will take place at Capital One Tyson's Corner Campus, McLean VA on September 30 & October 1, 2024. Tentative schedule below is subject to change. Attire is business casual.

**All CBA Committees, including the Mid-Tier Executive Forum, meet in person at CBA LIVE on Sunday, March 16th, 2025.*

If interested in either opportunity, please reach out to Kevin O'Connor at koconnor@consumerbankers.com or 202-552-6376.

Monday, September 30

12 - 4 p.m.	Lunch & Individual Committee Meetings
4:30 - 5:30 p.m.	General Session
5:30 - 6 p.m.	Cocktails
6 - 8 p.m.	Dinner
8 - 10 p.m.	Sponsor Night Cap Events

Tuesday, October 1

7 a.m. - 8 a.m.	Breakfast
8 a.m. - 11 a.m.	General Session
11 - 12 p.m.	Grab & Go
12 p.m.	Lunch Adjourn



CBA Committees Include:

Auto Finance
Branch Banking
CFPB
Community Reinvestment
Default Management
Deposits & Payments
Digital Channels
Fair & Responsible Banking
Fraud Management
Home Equity Lending
Internal Audit
Risk Management
Small Business Banking
Talent Management

In-person Committee Meeting Sponsorship Opportunities

*Committee Meeting Sponsorships are not included as part of a Year Round package.



Thought Leadership Opportunity - \$20,000

Take advantage of this rare opportunity to present to all committees at the Fall Meeting. Date and Time TBD.

Perch Putt - \$10,000

Enjoy this 18-hole mini golf course located on top of the Capital One Center with seasonal street food and drinks. Sponsors can invite up to 50 bankers to take part in this experience on Monday, September 30, 2024



Happy Hour - \$10,000

Sponsor an exclusive Happy Hour at the Watermark on September 30, 2024.



Starr Hill Biergarten - \$10,000

Sponsor a unique experience at the Starr Hill Biergarten on Monday September 30, 2024. Sponsorship includes food and drinks for up to 50 people.

Cocktail Hour - \$10,000

Sponsor the cocktail reception for all attendees before they head out for the night on Monday September 30, 2024.



Grab and Go Lunch Sponsorship - \$10,000

Sponsor lunch for all attendees on Monday September 30, 2024 before an afternoon of meetings and events.

CBA LIVE Exhibit & Sponsorship Details

*Associate Membership is REQUIRED in order to sponsor/exhibit at CBA LIVE.



There is no better place to do business with retail banking than CBA LIVE.

Here's why:

+ Nearly 1-to-1 Ratio

Of the 1,700 CBA LIVE attendees, more than 700 are bankers.

+ Senior Bankers

CBA LIVE attracts retail banking's decision-makers, allowing you to make connections that make a difference. Of the 700 bankers who attend:

- 45% are EVP/SVP
- 11% are C-Suite
- 18% are VP/AVP
- 26% are Directors /Managers

+ Rich Content

With programs driven and developed by members, you'll learn about the hottest topics from those at the center of the issues. 6 tracks to provide answers to challenges facing the industry. Over 60 hours of information-packed programming from industry experts

+ Energy

It's more than a conference. It's an entertaining, engaging experience. You'll leave CBA LIVE informed, connected and inspired.

CBA LIVE

Our annual conference is where retail banking leaders gather to share industry trends, learn policy issues and plan for what's ahead. This three-day, must-attend offers unsurpassed programming, top-notch presenters and networking you will not find at other events.

Event Sponsorship Tiers

Associate Membership is required in order to exhibit/sponsor at our events. Sponsor levels are determined by total sponsorship dollars spent. This does not include exhibit booth dollars. All sponsorship items and benefits are listed in the following pages below.

+ Platinum (\$35,000 +)

Includes: Four (4) Complimentary registrations at CBA LIVE, CBA LIVE registration list with email addresses (three (3) lists provided on fixed weeks), logo & 250 word description included in Mobile App (sponsor to provide logo & description), signage & branding on-site at CBA LIVE.

+ Gold (\$25,000 - \$34,999)

Includes: Three (3) Complimentary registrations at CBA LIVE, CBA LIVE registration list with email addresses (three (3) lists provided on fixed weeks), logo & 250 word description included in Mobile App (sponsor to provide logo & description), signage & branding on-site at CBA LIVE.

+ Silver (\$15,000 - \$24,999)

Includes: Two (2) Complimentary registrations at CBA LIVE, CBA LIVE registration list without email addresses (two (2) lists provided on fixed weeks), logo & 250 word description included in Mobile App (sponsor to provide logo & description), signage & branding on-site at CBA LIVE.

+ Bronze (\$3,500 - \$15,000)

Includes: One (1) Complimentary registration at CBA LIVE, CBA LIVE registration list without email addresses (two (2) lists provided on fixed weeks), logo & 250 word description included in Mobile App (sponsor to provide logo & description), signage & branding on-site at CBA LIVE.

Access & Networking



Chairman's Reception- \$100,000

Includes exclusive access to CBA's leadership. Over 270 bankers attend, including the Board of Directors, Committee and Council Members at a reception-style event on Sunday March 16th, 2025.

General Session Keynote Luncheon- \$60,000

Gain access to senior level executives on Tuesday, March 18, 2025, during the general session luncheon by inviting attendees to your two reserved tables. Additionally, two attendees from the sponsoring company will be invited to sit at the head table with members of the CBA Board of Directors and VIPs.

Registration Cafe- \$50,000

Sponsor the gourmet coffee station at CBA LIVE. This station will not only attract attendees to network and relax, but it will also be the central point for registration. For Monday and Tuesday only.

Opening Lunch in the Exhibit Hall- \$35,000

Network with your clients and prospects in the social atmosphere of the exhibit hall, where attendees can grab a bite and catch up before the programming begins.

Warm Welcome Breakfast - \$30,000

Get a jump on networking and meet some attendees at our opening breakfast for the entire conference in the exhibit hall. Breakfast will last for one hour and will be available for all attendees. Available Monday March 17, 2025.

VIP Reception - Email for Pricing

Host a VIP invitation only reception for the senior executives with whom you wish to interact. CBA can assist with the invitation process and works with you to plan the location and menu of the reception. Number of attendees, size of venue and prices will vary. Available on Monday and Tuesday evenings.

Access & Networking



Laser Skeet-Shooting Experience - \$25,000

Up to 10 contestants compete at the same time, with specially designed Italian made over-under shotguns allowing up to 60 people to participate. The Grande Lakes Golf Team assists the shooters throughout the round. Features include no recoil, adjustable simulated shot volume, and harmless infrared “shots” making it a pleasurable experience for participants and spectators alike. Appetizers and drinks are included with the experience.

Cocktail Receptions in Exhibit Hall - \$25,000

Host all CBA LIVE attendees for an evening of networking and fun at a reception held in the exhibit hall. As the sponsoring company, you will have the opportunity to welcome attendees at the beginning of the reception. Available Monday and Tuesday of the conference.

Coffee Stations- \$20,000

Attendees are always in search of coffee between sessions. The station, set in the foyer area for easy access, will feature ready-made coffee for attendees. Available Monday or Tuesday of CBA LIVE.

Continental Breakfast- \$15,000

Be the first name conference attendees see on Tuesday morning. Breakfast will be available in the exhibit hall on Tuesday March 18, 2025 for one hour.

Afternoon Snack Break- \$12,000

Attendees are always in need of a snack break after a long day of programming. Available Monday and Tuesday of the conference for half an hour in the exhibit hall.

Sunrise Yoga - \$10,000

Get your heart rate up and start your morning off right with fellow attendees. As the exclusive sponsor for Tuesday's workout, CBA will help promote via marketing emails and the general session. Available Tuesday, March 18, 2024.

Morning Refreshment Break- \$8,000

Refresh attendees in the morning with coffee, tea and other beverages. Available Monday and Tuesday for a half hour in the exhibit hall.

Sunday Morning Activities

CBA will host our Annual Golf Tournament at CBA LIVE on Sunday, March 16, 2025 at The Ritz-Carlton Golf Club, Orlando, Grande Lakes. This course has been the home for the PNC Championship.



Golf Tournament Title Sponsor - \$60,000

CBA handles all logistics for the event on Sunday March 16, 2025. Greens fees for all bankers is included, as well as, lunch for all participants. Sponsor has the ability select the pairing for two groups.

Beverage Sponsor - \$10,000

Sponsor all beverages for golfers on Sunday March 16, 2025. Signage will include sponsor logo. Sponsor has the ability to provide additional swag.

Breakfast Sponsor - \$10,000

Start the day of right for our golfers by sponsoring the breakfast before the 7:30am shotgun start. Signage will include sponsor logo. Sponsor has the ability to provide additional swag.

Caddie Bibs - \$5,000

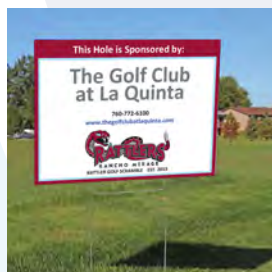
All caddies will wear your logo for the entirety of the golf tournament.

Caddie Hats - \$2,500

All caddies will wear your logo for the entirety of the golf tournament.

Sponsor a hole - \$1,000

Sponsor one of the holes at the CBA LIVE golf tournament. Signage is included in price. Sponsor has the ability to provide additional swag.



Sunday Morning Activities



Pickleball - \$20,000

Sponsor our first Pickleball Tournament at CBA LIVE on Sunday, March 16, 2024. Instruction, paddles and court fees covered by CBA. Sponsor has the ability to hand out swag/prizes to participants. Space is limited for up to 60 participants.



Winter Garden Bike Ride - \$20,000

This two (2) hour tour is personalized based on the group; history, nature, exercise, or more can be the theme of the ride! Several stops along the way include Nature Preserve, Butterfly Garden, and the Oakland Heritage Museum. Tour will be two (2) hours and for up to 50 guests.



Cypress Forest Kayak Tour - \$15,000

This two (2) hour guided eco-tour includes transportation, kayak rental, life jackets, and water. Tour guides will provide information about the history and ecology of Single Creek, to include pointing out local wildlife and nature elements along the Creek. Tour will be two (2) hours for up to 50 guests.



Winter Park Boat Tour - \$15,000

This one (1) hour scenic tour includes a relaxing, open-air boat ride past Rollins College and luxurious homes along three beautiful lakes and canals. Tour will be one (1) hour for up to 54 guests.



Paradise Fishing Experience - \$15,000

This three (3) hour guided catch and release experience will include all necessary fishing gear, transportation, and light snacks. The experience will be three (3) hours for up to 21 guests.

Networking & Connection Space



Connect Lounge - \$20,000

Utilize the great foyer space at CBA LIVE for attendees to connect and network in an open setting. Each connect lounge will feature comfortable seating for 8, your company's branding and charging capabilities. 13 connect lounges available.

Private Meeting Room (Hotel Space) - \$17,000

Reserve a private meeting room on the lower level of the conference space. There are a limited number of meeting rooms available in the hotel. Meeting room will include water/sodas and snack items to be refreshed all three days of the conference. Meeting room sizes vary and rooms are limited. 20 private meeting rooms available.

Temporary Private Meeting Room - \$12,000

A 10x10 enclosed meeting room features seating for 4, a small table, electric, mini-fridge stocked with sodas and waters, and a door with your company logo displayed. 3 temporary private meeting rooms available.

Thought Leadership



Deep Dive Workshop - \$20,000 (Reserved for Premier/Diamond Sponsors)

Host and present a topic of your choice during this 50 minute presentation at CBA LIVE. CBA will promote your workshop with CBA LIVE forum programming. Deep Dives are exclusive to Premier and Diamond sponsors of CBA and spaces are limited.

Tech Demo & Showcase - \$15,000

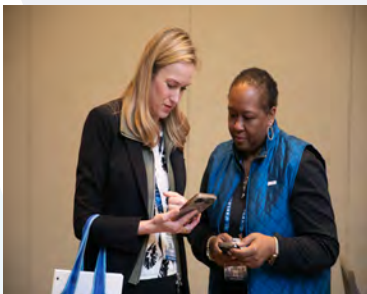
Propose your company's thought leadership, breaking news, case study results or a tech demonstration! CBA will have final approval on topic/presentation style during this 10-minute presentation (5 minutes of content, 5 minutes of live Q&A with a CBA VIP) at CBA LIVE. Date and time TBD. 3 Tech Demo spots available.

Brand Recognition



Wi-Fi Access - \$40,000

As the exclusive sponsor of the Wi-Fi, your company brand will be advertised on screens and table-top signage throughout the event. You can also create a unique password to be input by all attendees.



Mobile App - \$40,000

Attendees want immediate access to CBA LIVE information on their mobile phones. As the exclusive sponsor of the app, your branding will be included on the splash page and on all CBA LIVE marketing promotions.

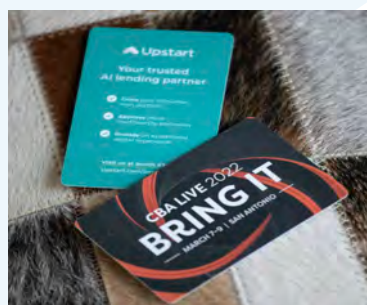


General Session Keynote - \$30,000

Bring your company to the attention of every attendee by sponsoring a general session keynote speaker on Monday March 17, 2025. CBA will work with you on how to make the most of this welcoming experience.

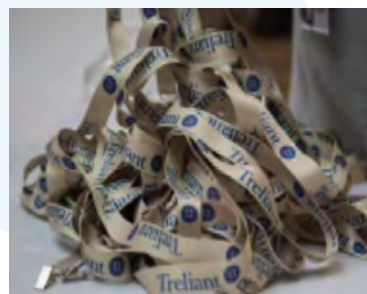
Hotel Keycards - \$25,000

Create brand awareness with this highly visible sponsorship. Your company's logo and booth location (if applicable) will be co-branded with the CBA LIVE theme on the room keys given to attendees during their stay.



Room Drop & Turndown Service - \$25,000

Give CBA LIVE attendees a little pampering away from home with this sponsorship. As a sponsor, you'll be able to leave a gift (with CBA's approval) in each attendee's room. You can choose Sunday, Monday or Tuesday. Sponsorship is per individual night.



Conference Lanyard - \$25,000

Lanyards are handed out to everyone at registration. Your company's logo will be visible on every attendee at CBA LIVE imprinted on a custom lanyard which holds each attendee's name badge.

Brand Recognition



Forum Track Room Sponsorship - \$15,000

Sponsor a Forum Track Room at CBA LIVE. Room sizes will vary depending on schedule/content. Your logo will be included on all onsite signage. Available on Monday and Tuesday at CBA LIVE. You will also have the opportunity to place promotional items on chairs during the first session of the day.

Rooms Available:

Palazzo ABC

Palazzo D

Palazzo E

Mediterranean 1

Mediterranean 2

Mediterranean 3

Audience Polling - \$15,000

Your company's branding will be included on every audience polling slides used in the general session at CBA LIVE.

Points Race in Mobile App - \$11,000

Join CBA to enhance attendees' engagement with the mobile app and promote your brand at the same time! CBA will work with you to create a points-race game at CBA LIVE. This is a highly visible sponsorship and will leave attendees with fun memories of their time at the event.

Commercial or Video Ads - \$8,000

Provide a commercial or short video to play in the conference area (outside of the general session OR exhibit hall) between programming sessions. Video will play Monday, Tuesday and Wednesday and should be no longer than two minutes in length. 5 Commercial Ads available.

JW Marriott Branding Options

Rotunda Area - Main Entrance to Conference Space

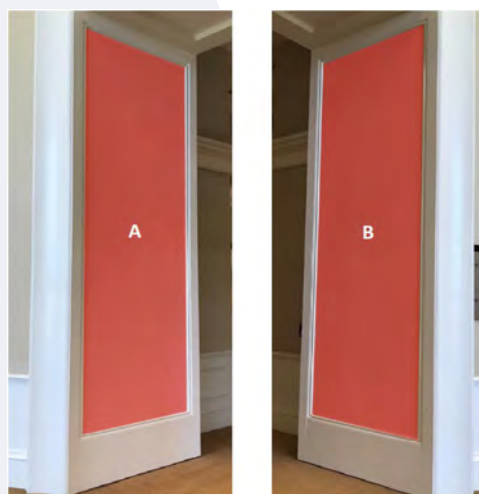
Retail Corridor A&B - \$10,000



Palazzo Hallway A&B - \$10,000



Med Hallway A&B - \$10,000



JW Marriott Branding Options

**Mediterranean Foyer - Outside Main Hallway
on the way to the Exhibit Hall and General
Session**

Mediterranean 2 A-E - \$15,000



Mediterranean 12 E-J - \$15,000

Mediterranean 12 O-T - \$15,000

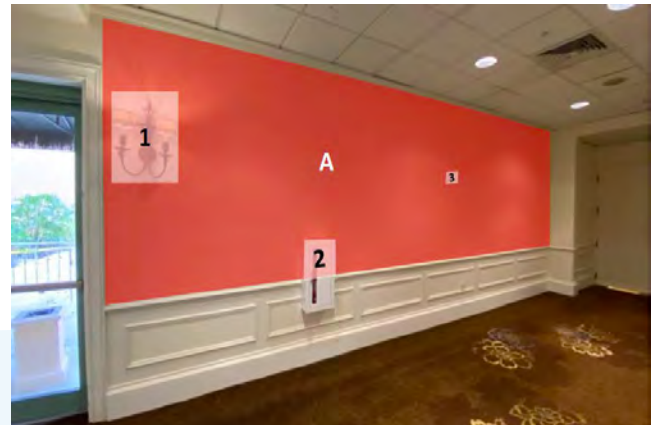




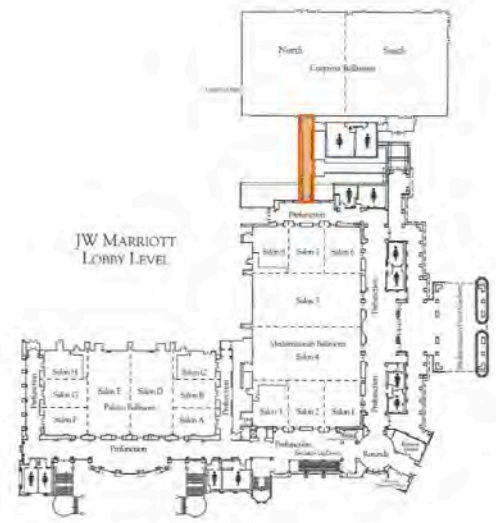
JW Marriott Branding Options

Coquina Hallway - Outside the only Indoor walkway for attendees to enter the General Session Ballroom

Coquina Hallway 1&2 - \$25,000



Coquina Hallway 3&4 - \$25,000





JW Marriott Branding Options

Mobile Branded Items

Mobile Water Cooler -
\$8,000



Hand Sanitizer Stand -
\$8,000/each



Branded Cubes -
\$8,000



Meter Board Signs
- \$3,500/each



Charging Station - \$11,000





CBA LIVE Exhibitor & Sponsorship Information

*Associate Membership is REQUIRED in order to sponsor/exhibit at CBA LIVE. To become a member, please email Jordan Selmer at jselmer@consumerbankers.com



Exhibit Information

10' x 10' Exhibit Booth: \$8,000

All exhibiting companies will receive: (1) 10' x 10' exhibit space with back and side draping

- (1) 6' draped table
- (2) chairs
- (1) wastebasket
- (2) complimentary registrations, and
- 24-hour security.

Additionally, CBA will include a listing of your company with a brief description, as well as your booth location, contact information and a link to your company's website (exhibit to provide all information)

CBA LIVE

Hotel Information

JW Marriott Orlando, Grande Lakes
4040 Central Florida Pkwy, Orlando FL, 32837

\$319/night + \$28 resort fee/night

Housing Group Reservation Contact: lacey@stagedrightevents.com

*only registered attendees may book their hotel room.

Additional Information

Exhibitors, Silver and Bronze Sponsors: One (1) complimentary list of registrations will be sent to you three weeks before the conference and One (1) list of final registrants will be sent one week after the conference. Registrant list includes full name, company, business title, business mailing address and conference forum track preference of each registrant. Exhibitors, Silver and Bronze Sponsors may use each list to make one-time contact with the registrants.

Platinum and Gold Sponsors: Two (2) complimentary lists will be sent six weeks and three weeks before the start of the conference and One (1) list of final registrants will be sent one week after the conference. Registrant list includes full name, company, business title, business email address, business mailing address and conference forum track preference of each registrant. Platinum, Gold and Silver Sponsors may use each list to make one-time contact with the registrants.

Restrictions

Music: Due to the music licensing fee required by ASCAP and BMI, we must know in advance if you plan to have live or recorded music (audio or video) in your booth.

Height: Exhibit booths are restricted to 12 feet in height. You will be asked to remove any part of the booth which exceeds 12 feet.

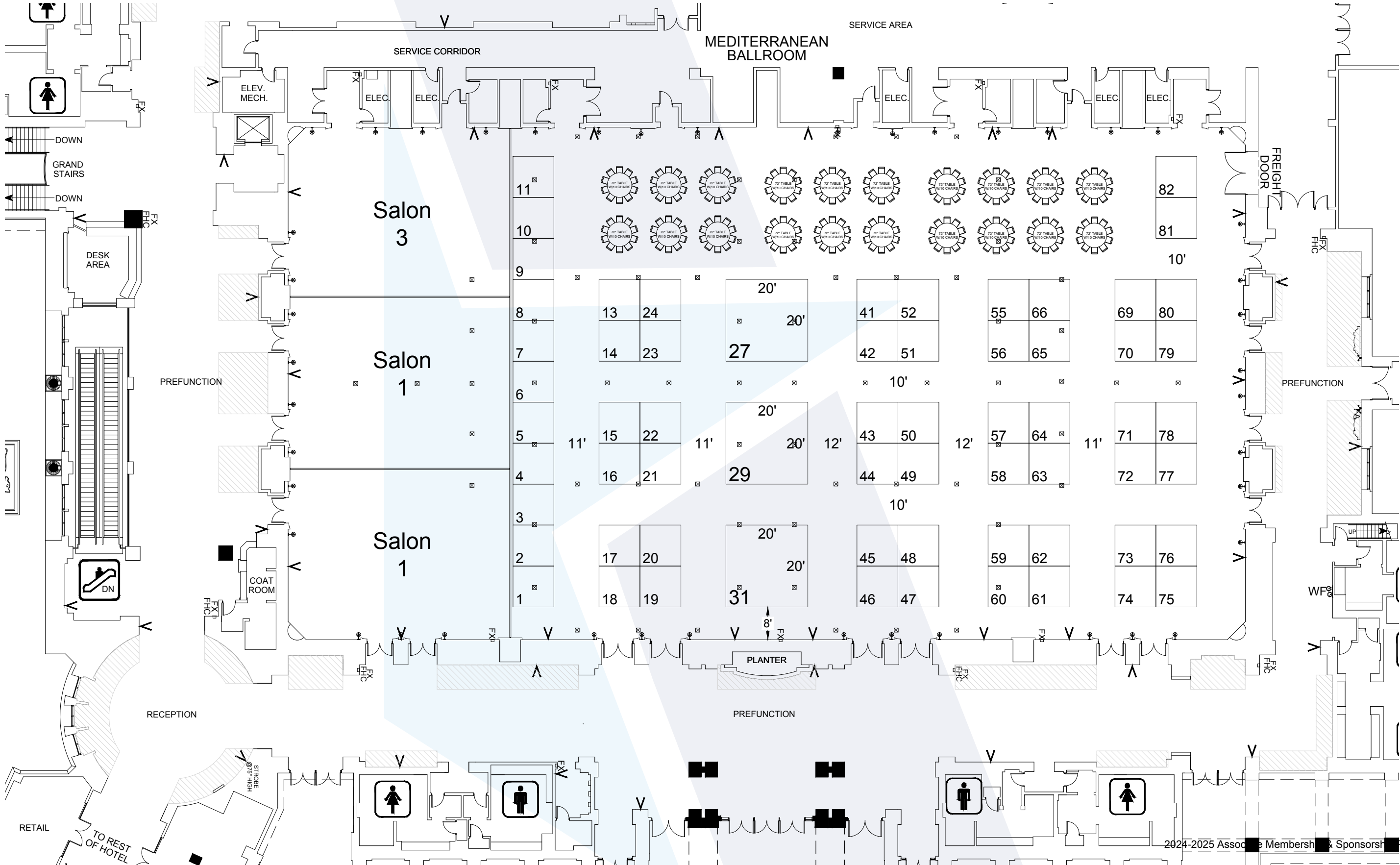
Hanging Banners/Rigging: The opportunity to hang banners or signage above your booth in the exhibit hall is strictly reserved for Premier Corporate Sponsors and only with approval from CBA.



CBA LIVE

03/17/25 - 03/19/25

JW MARRIOTT ORLANDO GRANDE LAKES - MEDITERRANEAN 4 - 8 - ORLANDO, FL



REVISION			
Date: 4/23/2024			
By: Gloria Hurtado			
BOOTH COUNT			
Inventory as of 04/23/2024			
Dimension	Size	Qty	SqFt
10'x10'	100	61	6,100
20'x20'	400	3	1,200
Totals:		64	7,300

- BLDG. LEGEND:
- FA = FIRE ALARM
 - FX = FIRE EXTINGUISHER
 - FHC = FIRE HOSE CABINET
 - VS = FIRE STROBES
 - VS = FIRE STROBES 6'-3" HEIGHT LOBBY
 - WS = WALL SCNCES
 - WS = WALL SCNCES LOBBY

DRAWING INFO

Passport Line Item Number:
#12705974

Facility:
JW MARRIOTT ORLANDO GRANDE LAKES

Facility Location:
MEDITERRANEAN 4 - 8

City & State:
ORLANDO, FL

Scale: CUSTOM

Project #: ----

Acct. Sales: ALISA OSBORNE

Acct. Mgmt.: ----

Started: 4/23/2024

Started By: GLORIA HURTADO

Prod. Branch: ORLANDO

Freeman.

Disclaimer - This floor plan is preliminary and subject to change pending review and official approval by all authorities having jurisdiction. Every effort has been made to ensure the accuracy of all information contained on this floor plan. However, no warranties, either expressed or implied, are made with respect to this floor plan. If the location of building columns, utilities or other architectural components of the facility is a consideration in the construction or usage of an exhibit, it is the sole responsibility of the exhibitor to physically inspect the facility to verify all dimension and locations.

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Corporate Sponsorships

Looking to connect with CBA's top leaders and bring your brand into the limelight? Corporate sponsorships are the perfect opportunity to get connected and stay connected with retail banking's top decision makers.

Tiers:

Premier - \$250,000

Diamond - \$140,000

Sapphire - \$70,000

Choose one of three tiers to enjoy access to executive leadership throughout the year and during our annual conference, CBA LIVE. Packages are customizable and can be catered to your individual company needs and business development.





Corporate Sponsorships (Year Round Opportunities)

CBA corporate sponsors enjoy a host of benefits throughout the year, including CBA LIVE and CBA Executive Banking School. Benefits include sponsored VIP events, branded giveaways, banner ads, and much more.

BEST VALUE,
VISIBILITY & ACCESS

**Premier
Benefits
Value:
\$337K***

**Diamond
Benefits
Value:
\$190K**

**Sapphire
Benefits
Value:
\$118K**

Year-Round Corporate Sponsorship Opportunities	Premier \$250K	Diamond \$140K	Sapphire \$70K
Associate Membership + Benefits <i>Valued at \$12K</i>	•	•	•
Landing page on CBA website – 1 year <i>Valued at \$20K</i>	•	•	•
White Paper Posting to CBA Website – Quarterly <i>Valued at \$4K</i>	•	•	•
Receive CBA's Gov't Relations Briefings – Quarterly <i>Valued at \$10K</i>	•	•	•
Webinars <i>Valued at \$5K each</i>	4	2	1
CBA SmartBrief Ads <i>Valued at \$1K per ad</i>	3	2	1
Committee Engagement or Other VIP Event <i>Valued at \$20K</i>	•	•	
Access to CBA Board & Committee Leaders <i>Valued at \$50K</i>	•		
Sponsorship of Item or Event at CBA Executive Banking School <i>Valued at \$15K</i>	•		
Keynote by CBA President & CEO at Your Client Event – 1x Year <i>Valued at \$10K</i>	•		
Corporate Sponsorship Opportunities at CBA LIVE	-----	-----	-----
Prominent Sponsorship at CBA LIVE	1 st Choice \$50K Value*	\$25K Value	\$15K Value
Selection of Premium Exhibit Booth at CBA LIVE <i>Valued per size at \$32K; \$16K; & \$8K</i>	Up to 20'x20'	Up to 20'x10'	Up to 10'x10'
Complimentary Registration at CBA LIVE <i>Valued at \$32K for 16; \$16K for 8; & \$8K for 4</i>	16	8	4
CBA LIVE Mobile App Banner Ad, Logo, & Sponsor Listing <i>Valued at \$15K</i>	•	•	•
Signage & Branding / Mention in General Session <i>Valued at \$10K</i>	•	•	•
CBA LIVE Attendee List (3 Lists on Fixed Weeks - <i>Valued at \$10K (6 weeks, 3 weeks and 1 week post-event)</i>)	•	•	•
Commercial to Air in Forum or Outside General Session <i>Valued at \$8K</i>	•	•	
Private or Semi-Private Meeting Space <i>Valued at \$17K</i>	•	•	
Host of Roundtable or Workshop at CBA LIVE <i>Valued at \$20K</i>	•	•	

Evergreen Sponsorships

Throughout the year, CBA offers members a host of ways to stay up to speed on all things retail banking. Add your brand to these popular CBA member benefits to increase your exposure and connect with target audiences.

Evergreen Sponsorships

Webinars - \$5,000 each

Sponsor a webinar with CBA. Choose the topic, content, and speakers. CBA will handle registration, marketing, and broadcast. You will receive a final attendee list and a recording of the webinar.

White papers - \$1,000 each

Share the latest trends and analysis by publishing a white paper through CBA. White papers are promoted to all members through CBA's CEO Weekly Report.

CBA SmartBrief - \$1,000 each

Market your brand to more than 9,000 subscribers enrolled in this free daily publication, reaching both CBA members and non-members.

CBA Committee Presentation-Email for pricing

CBA has multiple opportunities for engagement with membership throughout the year. Choose from our 15 committees, each dedicated to a key area of banking. Availability depends on the level of corporate sponsorship.





Premier Sponsors

curinos

experian.

EQUIFAX

fiserv.

FICO



VISA

Diamond Sponsors

BCG BOSTON
CONSULTING
GROUP

blend

FIS



RELAY

SentiLink

Upstart

VERICAST

zeta

Sapphire Sponsors

**ACCURATE
GROUP**

Bradley

CGI

Early Warning

Guidehouse
Outwit Complexity

LexisNexis
RISK SOLUTIONS

Nasdaq
Verafin

ncino.

ORACLE

Pinwheel

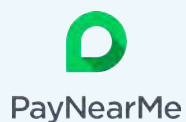
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CBA LIVE 2024 Event Sponsors





CBA Advanced Education Sponsorships

CBA's Advanced Education programs are taught by our renowned faculty and feature proprietary curriculum focused on three management aspects of retail banking.

CBA's Board of Directors, Education Council and Committees support CBA Advanced Education programs by nominating their employees to attend, serving as faculty or lecturers, and celebrating milestones with their bank's students throughout their learning experience.

These sponsorships offer the unique benefit of networking and building relationships with today's top retail banking executives, as well as the talented professionals likely to lead the industry, while also supporting CBA's education initiatives.



Executive Banking School

Our three-year graduate program is our most comprehensive and offers all three areas of curriculum. Students complete independent course work throughout the year and gather each summer for a 10-day in person session at Furman University in Greenville, SC.

Date: July 20 -30, 2025

Advanced Education Sessions

CBA brings retail banking education directly to its member companies, via one, two and three-day programs presented to 25-60 employees. The hosting member chooses the curriculum track to be taught at their CBA Advanced Education session.

Cost - Email for pricing

Banking Fundamentals (2-Day Session)
Built for employees in consumer sales, marketing, legal, IT, HR, operations, those who are new to banking.

MarketSim (3-Day Session)
Built for AVPs, VPs

BankCom (4-Day Session)
Built for VPs, SVPs, EVPs,

Additional information regarding each session can be found in the following pages.



CBA Executive Banking School Sponsorships



Emerging Leader Happy Hour | \$20,000

Bank Dinner Night in Greenville, SC is one of the most anticipated events. Host a happy hour prior to their respective dinners for great networking and a memorable start to the evening.

Graduation Brunch | \$15,000

Celebrate EBS graduates by sponsoring an intimate brunch held for them and senior faculty members. This sponsorship includes a delicious brunch buffet, mimosas, music, branded signage & branded napkins.

Kick Off Party | \$15,000

Welcome students to school by sponsoring a kick-off party of the opening day of summer session. Includes appetizers, refreshments, signage, and sponsor-branded napkins.

Evergreen Event | \$15,000

Students and faculty will join for an evening of fun at with food, drink and games. All students and faculty members attend, and your logo will be featured on napkins, a branded item, with ample time to entertain and network.

Breakfast Roundtable | \$15,000 | 1 Available

Host an engaging discussion with students over eggs & bacon! The roundtable will take place on campus within the first week of classes. Students will receive an invite with your logo and presentation topic included.

Tote Bags | \$10,000

Your company logo will be imprinted on the bags and you may include any promotional material and/or giveaway inside the totes – a great branding opportunity! Students hold all their study materials and tablet in their branded bag.

Notebooks & Pens | \$10,000

Ensure students are well prepared for CBA Executive Banking School with a branded leather portfolio and pen they'll keep for years to come—all the notes students keep will come in handy when they're back at their bank!

Water Bottles | \$10,000

Travel water bottles branded with your logo will be handed out to students at registration with all their materials. Faculty members will also receive them in the faculty lounge.

Golfcarts | \$10,000

Sponsor the main form of transportation for faculty on campus at EBS. Sponsor logo would be prominently featured on all six golf carts.

Lanyards | \$10,000

Lanyards are handed out to students, faculty, interns and CBA team at registration. Your company's logo will be visible on every attendee at EBS imprinted on a custom lanyard which holds each attendee's name badge.

Bank Dinner Night for Non-Hosted Students | Email for Pricing

Host a VIP invitation only reception for the students who will not have a dinner to attend on Bank Dinner Night.. CBA can assist with the invitation process and works with you to plan the location and menu of the reception. Number of attendees, size of venue and prices will vary.



Banking Fundamentals

Overview

This seminar helps participants understand the relationship of bank strategy and the core elements of banking, including the nature and sources of risk, the relationship between risk and return, the changing framework of regulation, and how their function affects and is affected by others within the bank.

Target Audience includes:

- Bankers new to the industry
- Bankers in functional roles with minimal P&L exposure
- Bankers with experience in a limited number of banking activities

Format:

- Seminar length is 2 days in person and 3 or 4 days when delivered virtually
- The topics are customized based on audience background and needs, and the specifics of the bank's financial statements
- Seminar size up to 40 participants
- Teaching methodology utilizes a combination of lectures and small group exercises, incorporating publicly available bank data as the basis for class work

Learning Objectives

By the end of the seminar participants can:

- Demonstrate a fundamental understanding of how a bank makes money within the parameters of economic circumstances, competitive influences, risk factors, and regulatory requirements
- Describe bank strategy and the risk elements that must be considered and their impact on strategic product and pricing choices in both lending and bank funding
- Complete a high-level analysis of both the bank and a peer utilizing an understanding of key metrics and the bank's publicly available financial information
- Describe the current financial services environment and key issues facing the industry and its customers

Seminar Modules

Based on the needs assessment conducted with the bank, this seminar can be customized to best meet the learning needs of the organization including modification to modules listed below:

1. The Business of Banking
 - a. Overview of the business model for banking - creating value for customers and shareholders
 - b. The nature and sources of return (profit) in retail banking
 - c. Summary of the regulatory and macroeconomic environment
 - d. Economic cycles and their impact on the availability of loans and deposits
 - e. Description of the funds transfer pricing (FTP) mechanism
2. Bank Financial Statements
 - a. Introduction to bank financial statements, including basic accounting concepts
 - b. The balance sheet and income statement and their reflection of bank strategy
 - i. Investment and funding options on the balance sheet
 - ii. The drivers of performance on the income statement
 - c. Introduction to measuring performance via analysis of ROE decomposition, showing the sources of risk and return
3. Risk Management
 - a. Overview of risk management in banking
 - b. Credit Risk – definition of credit risk and the impact of loss rates, portfolio composition, and the credit cycle on credit risk management
 - c. Liquidity Risk – definition of liquidity risk and the impacts on funding, trading, and the business strategy of managing to liquidity requirements, including under BASEL III
 - d. Interest Rate Risk – definition of interest rate risk and methodologies for measuring the risk based on the bank's assets and liabilities
 - e. Operational Risk – definition and business impacts of operational risks
4. Balance Sheet Choices: Lending
 - a. The nature and evolution of retail and commercial credit products
 - b. Introduction to the credit cycle, from product design to collections
 - c. The regulation of credit
5. Balance Sheet Choices: Funding the Bank
 - a. The different ways of funding a retail bank and the role of deposits
 - b. The nature and evolution of retail and commercial deposit products
 - c. The cost of funds: maximizing bank value by optimizing the risk adjusted cost of funds
6. Capital
 - a. The role of capital and its relationship to risk
 - b. Measurement of capital
 - c. Capital adequacy under BASEL III

MarketSim

Overview

This seminar focuses on optimizing the retail business using a simulation that replicates the workings of a retail bank marketplace. It will deepen understanding of the risk/reward tradeoffs in developing a retail strategy, integrating customer segmentation, product offerings, pricing, delivery channels, marketing and branding.

Target Audience includes:

- Managers working in a specific area of the consumer business or a support function who would benefit from a better understanding of how their function impacts and is impacted by other retail functions
- Branch and district managers who need to understand the ripple effects of retail decisions for both the bank and the customer
- Area presidents who would benefit from becoming more well-versed in enacting comprehensive retail strategies

Format

- Seminar length is 2.5 days in-person and 3 or 4 day formats when delivered virtually
- Seminar size is up to 30 participants
- Teaching methodology uses a combination of lecture, small group and hands-on learning via simulation

Learning Objectives

By the end of the seminar participants will:

- Have greater insight into the interplay between key retail strategies in product lines, delivery channels, and customer segmentation
- Understand the cross-departmental teamwork and integration necessary for retail bankers to achieve their goals
- Evaluate trade-offs in decision-making while solving to a business plan and balanced scorecard

The Scenario

Retail MarketSim participants are responsible for the operation of a \$2+ billion retail division of a large community bank operating in a hyper-competitive, dynamic marketing environment. Seminar participants are divided into teams with each team managing one of several banks in a community. A set of decisions are made with a focus on desired customer segment mix, marketing, products and delivery channels based on a business plan crafted by the team. After each decision, results are



compiled and facilitated discussion of learnings are completed and new concepts introduced prior to the next set of decisions.

The customer preferences and buying patterns in Retail MarketSim are based on actual consumer behavior and demand elasticity factors that have been identified and documented through extensive client work and research.

The Simulation

The simulation illustrates how customers are likely to react to simultaneous and various changes in:

- Marketing strategies
- Product pricing and setting features
- Distribution configuration

Each team is able to make operating decisions, and their impact on the customer, in the following areas:

Marketing

- Budget Development and Allocation
- Brand Strategy
- Segment Targeting

Product Management

- Product Selection
- Product Pricing
- Product Design

Delivery

- Customer Preferences of Physical vs Virtual Distribution
 - Branch Locations & Service Level
 - ATMs Locations & Service Level
 - Contact/Care Center Services
 - Online Banking
 - Mobile Banking
- Channel Economics

BankCom

Overview

This seminar provides a comprehensive view of overall bank management via a sophisticated bank management simulation highlighting modern performance and risk management principles. Participants learn to weigh the merits of strategic decisions consistent with risk constraints and in consideration of the impact of these decisions on shareholder wealth. Additionally, BankCom models an active capital market in which analysts' opinions have a significant impact on share price.

Target Audiences

- Mid- to upper-level managers with a basic understanding of bank financial statements who require a better understanding of more complex drivers of financial success
- Bank boards of directors
- Management trainees being groomed for executive roles within the bank

Format

- Seminar length is 4 days in-person and 5 days virtual
- Seminar size is up to 30 participants
- Teaching methodology uses a combination of lecture and small group, hands-on learning via simulation
- The seminar is conducted with CBA providing content and faculty

Learning Objectives

By the end of the program participants can:

- Assess bank performance using accounting, market value and, time permitting, economic value-based measures
- Assess the quality of a bank's risk management in the context of enterprise-wide risk management.
- Describe the choices available to senior managers to improve bank performance given risk/performance trade-offs while solving to a strategic plan.

The Scenario

BankCom participants are divided into 4-6 member teams responsible for the operation of a \$5+ billion regional bank operating in a competitive market in the context of an evolving economy. Decisions are made with a focus on achieving desired bank performance based on a strategic plan crafted by the team. After each decision, new financials are produced, serving as the basis for facilitated discussion. New concepts are introduced prior to the next set of decisions. The seminar's capstone is a "shareholder" presentation of results to all participants.



Essentials of BankCom

Bank Accounting, Financial Reporting, and Product Impact

- Bank Financial Statements Overview
- Understanding ROE -- ROE Decomposition
- Economic Context of Management Strategy
- Deposits, i.e., Net Deposit Cost and FTP-based profitability
- Lending Strategy – Products, Profitability and Credit Quality
- Treasury role and sources of funding
- CFO role, Capital and Infrastructure management

Measurement and Management of Key Risks

- Credit Risk
 - Credit Policy and Product choice and administration
 - Credit concentration limits
 - Metrics used in credit risk management
 - RAROC-based pricing
- Liquidity Risk
 - Measuring level of liquid assets and management of securities portfolio
 - Choice of funding sources
- Market (Interest Rate) Risk
 - Interest rate swaps
 - Measures of interest rate/market risk: accounting (gap, NII sensitivity), economic value (EVE) sensitivity and Value at Risk (VaR)
- Operational Risk Management
- Risk Management and Capital (capital adequacy and CCAR)
- Reinforcement of the interplay between risk appetite and performance