



# 2017 CFO Forums

Middlesex Savings Bank Training Center  
120 Flanders Road, Westborough, MA

*Do you wish you had time to exchange ideas freely, dissect problems, and discuss emerging issues with other bank financial managers?*

## How do these Forums work?

- Each Forum will meet three times during the year.
- Five to seven topics will be discussed at each session. Participants are strongly encouraged to suggest agenda topics of interest.
- Industry experts discuss hot topics at most sessions.

## Benefits of the Forums

- Increase your effectiveness as CFO.
- Learn what's working and what's not in bank financial management.
- Improve the efficiency of your bank's financial function.
- Network with other professionals.
- Get input on your most pressing problems.
- Obtain access to highly respected industry experts.
- Grow professionally as well as personally.

## Potential Forum Topics

- **Financial reporting issues:** Getting your board members the information they really need to know; challenges and opportunities in profit center/cost center accounting; effective planning, and budgeting
- **Profitability issues:** Measuring customer profitability; bank-wide pricing discipline; margin maintenance; product profitability; deposit pricing
- **Personal growth:** The CFO as a leader in the bank; time management; setting priorities effectively
- **People issues:** Recruiting, retaining, and compensating financial personnel; coaching for performance; personal improvement plans; motivating long-term employees
- **Regulatory issues:** Proper ALLL methodology; assessing your bank's financial controls, SEC and Sarbanes-Oxley Issues
- **Vendor issues:** The CFO's role in vendor assessment; negotiating with vendors; managing vendor contracts

For additional information about the content of this program, contact Tanya Duncan, Director, Education and Management Development, [tduncan@massbankers.org](mailto:tduncan@massbankers.org); (617) 502-3801.

**Participation is an investment for you and your bank's future. Don't miss this opportunity!**

### 2017 Session Dates

February 17

May 19

November 17

To register online log on to

[www.massbankers.org](http://www.massbankers.org)



# Enroll Early—Space is Limited!



## Meet Your Facilitator:

David Sidon, CPA, principal of The Navis Group will be facilitating the CFO Forums. The Navis Group is a consulting firm based in Gloucester, Massachusetts Sidon is a regular contributor to New England banking publications and has facilitated numerous sessions for banking trade associations in the Northeast.



Prior to launching his consulting business in 1998, Sidon's career included a dozen years in public accounting before commencing his banking experience as a community bank director in 1985. Once absorbed in the industry, his experience has included serving as a mortgage lender, chief information officer and community bank CEO. Since, his consulting work has often included interim roles as CFO, CIO and more recently, CRO for client banks. Sidon holds a masters degree in finance from Bentley College and a bachelors in business administration from Merrimack College.

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Enrollment Fees for Three-Session Forum:	
Members	Non-Members
\$599	\$1,190
Each Individual Session:	
\$250	\$500

Schedule of Events:	
8:30 a.m.	<b>Registration</b> —Continental Breakfast
9:00 a.m.	<b>Forum Convenes</b>
Noon-12:30 p.m.	<b>Lunch</b> (Provided)
2:00 p.m.	<b>Adjourn</b>

### Cancellation and Refund Policy:

**PLEASE NOTE:** January 26, 2017 is the deadline for cancellations. A \$100 per person cancellation fee will be charged. Withdrawals from individual sessions after that date will forfeit the enrollment fee. Enrollment will remain open until the sessions are full. Direct inquiries or registration/cancellation requests to Pat Tabolsky, Registrar, [ptabolsky@massbankers.org](mailto:ptabolsky@massbankers.org).

### Directions: 120 Flanders Road, Westborough

**Driving from North of Rt. 9:** Take 495 South to Route 9 West (Exit 23B). Follow approximately 3/10 mile to Computer Drive Exit. At top of ramp make left at traffic light onto Computer Drive. Stay in the right hand lane. Computer Drive becomes New Flanders Road as it loops over Route 9. (You will see Owen O'Leary's at set of lights). Stay straight through lights at Owen O'Leary's. Continue south on New Flanders Road. New Flanders turns into Flanders Road. Follow to 120 Flanders Road. Make left into the park, then first right into the MSB Parking Lot. Total mileage from Owen O'Leary's to 120 Flanders is approximately 1.2 miles. Follow the parking lot around to the right. The Training Center Entrance is on the right side of the building (2nd floor). Note: if wheelchair access is needed, enter through the front of the building. The elevator is located in the front lobby. Follow the signs to the Training Center on the 2nd floor.

**Driving from South of Rt. 9:** Take 495 North to Route 9 West (Exit 23B). Follow approximately 4/10's mile to Computer Drive Exit. At top of ramp make left at traffic light onto Computer Drive. Stay in the right hand lane. Follow as above.

## Registration

Name		New to Forum?	
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Nickname			
Title			
Institution		Asset Size	
Billing Address			
Session(s):			
City		State	Zip
Telephone			
Fax			
Email			
<input type="checkbox"/> Check made payable to Mass. Bankers Association \$ _____ Credit Card (Fax credit card information to our secure fax number 617-249-0441): <input type="checkbox"/> MasterCard <input type="checkbox"/> Visa <input type="checkbox"/> American Express <input type="checkbox"/> Discover Card Number _____ Expiration Date _____ Signature _____ <b>We cannot accept registrations with credit card payments via email.</b> Register online at <a href="http://www.massbankers.org">www.massbankers.org</a> or return completed form and payment to: Massachusetts Bankers Association-CFO17 One Washington Mall, 8th Floor Boston, MA 02108-2603			