

3<sup>RD</sup> ANNUAL

# Strategic Opportunities Conference

## M&A PROSPECTS FOR 2015

A regional conference of community bank leaders

*Produced in association with The Bank Strategy Institute*

**November 12-14, 2014 • JW Marriott, New Orleans**

Extensive CEO-to-CEO peer sharing and networking

Latest M&A market reports & pricing data

Meet the most active regional acquirers & advisers

Emerging growth strategies for community banks

Current capital funding and IPO strategies



CO-SPONSORED BY



Texas Bankers  
Association



Louisiana Bankers  
Association



Arkansas Bankers  
Association



Oklahoma Bankers  
Association



Mississippi Bankers  
Association

3<sup>RD</sup> ANNUAL

# Strategic Opportunities Conference

M&A PROSPECTS FOR 2015

A regional conference of community bank leaders



## What This Conference Offers

- Unique program format and content
- Emphasis on peer sharing by bank leaders
- Networking with the most active acquirers and advisers in the region
- Updates on all important M&A trends and regulatory developments
- Strategies for managing independence
- Special coverage for Sub S banks
- The latest on capital funding and IPO options
- The memory of a very worthwhile trip to New Orleans

## Who Should Attend

With an emphasis on free-wheeling, peer-to-peer sharing of ideas and resources, the conference aims for compact, relevant programming specifically designed for strategic decision-makers — senior executives who are shaping the community banking markets of tomorrow by finding ways to succeed today.

## CPE Credit

Participants receive up to 16 hours CPE credit with the TX State Board of Public Accountancy. There are no educational prerequisites.

## What Previous Attendees Said

*"I don't think you could sit there and not become very excited about the future of the industry — such an amazing number of approaches, personalities and unique ways of solving problems."*

*"I do think this is the future of bank meetings — regional. The mix of Louisiana, Texas, Arkansas and Mississippi bankers powerfully added to the meeting itself."*

*"I give this program straight 5s — outstanding! The speakers and topics were 'on the money.' It was very crisp and educational, and I came away from it with a number of great takeaways."*

*"Excellent presenters and program. Very good networking opportunities."*

## Hotel

The JW Marriott New Orleans is a luxury French Quarter hotel that benefits from a prime location in the Business District within steps of Bourbon Street.

Call the hotel directly at (888) 364-1200 to make your reservation. A special room rate of \$189.00 single/double has been reserved for the Conference. Rates apply November 11 through November 14. Please state that you are with the Regional Bankers Group (Code TXB in the reservation system) in order to receive the rate.

**All reservations should be made no later than October 20, 2014,** to secure a room at this rate. This program has been known to sell out. Make your reservation early to reserve your spot.

## Bring a Guest

While you're busy with the conference, your spouse/guest will have fun discovering all New Orleans has to offer. The hotel is ideally located in the heart of the historic French Quarter, shopping, award-winning restaurants and more. Your guest is invited to join us for all receptions.

## PRE-CONFERENCE WORKSHOP

**Wednesday, November 12**

### MAKING THE MOST OF INDEPENDENCE

Plan to arrive early for the pre-conference workshop on Wednesday, November 12. This special session is limited to the first 75 registrants. Sign up early to reserve your seat.

2:00 – 2:30 **REGISTRATION**

2:30 – 2:45 **STRATEGIES FOR MANAGING INDEPENDENCE**

*Remaining independent by design, not chance — tapping internal resources to support capital and shareholder liquidity*

Joseph M. Ford, Conference Chairman, Senior Partner, Fenimore, Kay, Harrison & Ford, Austin

2:45 – 3:45 **STRATEGIES FOR BRANCHING AND ORGANIC GROWTH**

*The fine art of playing the hand you have been dealt*

James D. Goudge, Chairman of the Board & CEO, Broadway Bancshares, San Antonio  
Mike Calvin, Principal, Level 5, Houston  
David R. "Jude" Melville, President & CEO, Business First Bancshares, Baton Rouge  
Mark L. Russell, CEO, Great Plains Bancshares, Elk City

3:45 – 4:30 **SUBCHAPTER S ISSUES**

*Is Sub S still the best choice for your bank? How to capture the Sub S premium for your shareholders upon sale*

Patrick J. Kennedy, Jr., Managing Partner, Kennedy Sutherland, San Antonio

4:30 – 5:15 **PRESERVING INDEPENDENCE THROUGH SUCCESSION PLANNING**

*Techniques for planning succession of ownership and management*

Ken Derks, Managing Consultant, Equias Alliance, Plano  
J. Scott Petty, Partner, Chartwell Partners, Dallas

# SCHEDULE

## WEDNESDAY, NOVEMBER 12, 2014

### 2:00 – 5:15 PRE-CONFERENCE WORKSHOP

Registration is limited to 75. Register early to reserve your seat.

### 5:30 – 7:00 WELCOME COCKTAIL RECEPTION

## THURSDAY, NOVEMBER 13, 2014

### 8:00 – 8:30 REGISTRATION AND BREAKFAST

### 8:30 – 8:45 YOUR STRATEGIC OPPORTUNITIES ARE WHERE YOU FIND THEM

Learning from your peers and leading advisers — where and how to look.

Joseph M. Ford, Conference Chairman

### 8:45 – 10:00 M&A 1.01 FOR BANK LEADERS

Key deal management skills for buyers and sellers.

Curtis Carpenter, Managing Director, Sheshunoff & Co. Investment Banking, Austin  
Chet A. Fenimore, Managing Partner, Fenimore, Kay, Harrison & Ford, Austin  
Dennis R. James, Director of Mergers & Acquisitions, Bank of the Ozarks, Little Rock  
Steve Wagner, Senior Manager, Crowe Horwath, Dallas

### 10:15 – 11:00 CONSOLIDATION STARTS AT HOME

Finding expansion opportunity in neighboring banks.

Moderator: Tom Mecredy, Senior Vice President, Vining Sparks, Austin  
C.T. "Tommy" Head, President & CEO, Goldthwaite Bancshares, Goldthwaite  
James E. Lindemann, Chairman & CEO, Industry Bancshares, Central Texas  
Jeffrey A. Wilkinson, President & CEO, Pioneer Bancshares, Austin

### 11:00 – 12:00 ONE ACQUISITION AT A TIME

CEO perspectives on evaluating and implementing a successful M&A strategy.

Moderator: C.K. Lee, Managing Director, Commerce Street Capital, Dallas  
Tyson Todd "Ty" Abston, Chairman & CEO, Guaranty Bancshares, Mount Pleasant  
J. Patrick "Pat" Hickman, Chairman & CEO, Happy Bancshares, Texas Panhandle  
George Martinez, Chairman of the Board, Allegiance Bancshares, Houston

### 12:15 – 1:15 LUNCHEON

Keynote Speaker: John W. Allison, Chairman of the Board, Home Bancshares, Conway, Arkansas

### 1:30 – 2:00 M&A MARKET TRENDS AND PRICING

Opportunities for 2015.

Chris Murray, Principal, Sandler O'Neill + Partners, New York

### 2:00 – 3:00 ACCESSING GROWTH CAPITAL AND M&A FINANCING FROM PUBLIC AND PRIVATE MARKETS

Is there an IPO in your future? What you need to know.

Moderator: Chet Fenimore, Fenimore, Kay, Harrison & Ford, Austin  
John D'Angelo, President & CEO, Investar Bancshares, Baton Rouge  
Brian Jones, Principal, BankCap Partners, Dallas  
Craig McMahan, Managing Director, Keefe, Bruyette & Woods, Austin

### 3:15 – 4:00 THE CHANGING M&A LANDSCAPE

How today's regulators and today's deals are different.

Cynthia A. Dopjera, Assurance Shareholder, Harper & Pearson Company, Houston  
Robert Ulrey, Managing Director, Stephens & Co, Little Rock  
Patrick J. Kennedy, Managing Partner, Kennedy Sutherland, San Antonio

### 4:00 – 5:00 SECRETS OF MANAGING SUCCESSFUL POST-ACQUISITION INTEGRATION

Culture, technology and people.

Moderator: R. Clark Locke, Managing Director, Hovde Group, Austin  
Randy Dennis, DD&F Consulting, Little Rock  
Dennis R. James, Director of Mergers & Acquisitions, Bank of Ozarks, Little Rock  
James E. Lindemann, Chairman & CEO, Industry Bancshares, Central Texas

### 5:00 – 5:30 THE ANATOMY OF SOUND BANK VALUATION

Which numbers really matter and why.

Karen Kline, ASA, Managing Director Valuations, Sheshunoff & Co Investment Banking, Austin

### 5:30 – 7:00 COCKTAIL RECEPTION

## FRIDAY, NOVEMBER 14, 2014

### 7:30 – 8:00 BREAKFAST BUFFET

### 8:00 – 9:00 GENERAL COUNSELS' REPORT

The current legal and regulatory landscape for ALL community banks.

Moderator: Tom Perish, Partner, Andrews Kurth, Houston  
B. Scott Daugherty, President/General Counsel, Compliance Alliance, Austin  
Rusty N. LaForge, EVP & General Counsel, Southwest Bancorp, Oklahoma City  
Charlotte Rasche, Senior EVP & General Counsel, Prosperity Bancshares, Houston

### 9:00 – 9:45 BALANCE SHEET PLANNING

Impact of new capital regulations, restructuring opportunities in acquisitions and asset valuation strategies.

Rick Childs, Partner, Crowe Horwath, Indianapolis  
Stephen C. Raffaele, CEO & President, MSC Asset Management, Dallas  
Debbie Scanlon, Partner, BKD

### 9:45 – 10:45 REGIONAL ACQUIRERS ROUNDTABLE

What are the bigger banks looking for?

Moderator: Kade Machen, Director, Sterne Agee, Dallas  
Geoffrey "Geoff" D. Greenwade, President & CEO, Green Bank, N.A., Houston  
George A. Makris, Chairman & CEO, Simmons First National Corp., Little Rock  
James D. "Dan" Rollins, President & CEO, BancorpSouth Bank, Tupelo

### 10:45 – 11:30 THE ANNUAL TAKEAWAY ROUNDTABLE

Audience and panelists share their parting takeaways and predictions for another year.

**Each bank attending will receive a personalized bank valuation report prepared by Sheshunoff & Co.**

## WHO'S COMING?

### BANKER PANELISTS INCLUDE:

Tyson Todd "Ty" Abston, CEO, Guaranty Bancshares

John W. Allison, Chairman, Home Bancshares

John D'Angelo, CEO, Investar Bancshares

Geoffrey "Geoff" D. Greenwade, CEO, Green Bank, N.A.

James D. Goudge, CEO, Broadway Bancshares

C.T. "Tommy" Head, CEO, Goldthwaite Bancshares

J. Patrick "Pat" Hickman, CEO, Happy Bancshares

Dennis R. James, Director of M&A, Bank of the Ozarks

Rusty N. LaForge, EVP/General Counsel, Southwest Bancorp

James Lindemann, CEO, Industry Bancshares

George Martinez, Chairman, Allegiance Bancshares

George A. Makris, CEO, Simmons First National Corporation

David R. "Jude" Melville, CEO, Business First Bancshares

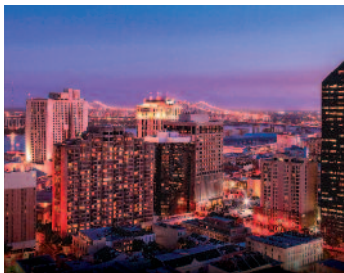
Charlotte Rasche, EVP/General Counsel, Prosperity Bancshares

James D. "Dan" Rollins, CEO, BancorpSouth Bank

Mark L. Russell, CEO, Great Plains Bancshares

Jeffrey A. Wilkinson, CEO, Pioneer Bancshares

**YOU NEED TO BE HERE TOO!**



3<sup>RD</sup> ANNUAL

# Strategic Opportunities Conference

## M&A PROSPECTS FOR 2015

A regional conference of community bank leaders

**November 12-14, 2014 • JW Marriott, New Orleans**

**PLEASE DUPLICATE THIS FORM FOR EACH REGISTRANT.**

☐ Mr. ☐ Ms.

Name

Title

Firm/Bank

Street Address

City, State, Zip

Mailing Address (If different from above)

City, State, Zip

Phone

Fax

Email

## Registration Fee (Deadline October 20, 2014)

The fee includes instruction, materials, reception, breakfast and lunch. Please register by completing the form and return it with your payment. You will receive a confirmation via email. Full registration fees will be refunded if written notice is received no later than **November 5, 2014**. There will be no refunds after this date. For additional information, call 800-462-7295, fax 512-473-2560 or email [sharon@texasbankers.com](mailto:sharon@texasbankers.com).

☐ \$725 Member Early-Bird  
(deadline: September 15, 2014)

☐ \$675 Additional Member Early-Bird  
(deadline: September 15, 2014)\*

☐ \$795 Member (after September 15, 2014)

☐ \$745 Additional Member  
(after September 15, 2014)\*

☐ \$1,590 Nonmembers

*\*Due to the special handling and processing involved for quantity discounts, these registrations must be received together.*

☐ I plan to attend the pre-conference workshop on Wednesday, November 12  
(limited to first 75 registrants)

\$\_\_\_\_\_ TOTAL ENCLOSED

If you have a disability that may impact participation, please forward a statement regarding special needs to TBA.  
For IRS Reporting purposes, the food cost portion of your registration is \$375.

## Please complete and mail with check to:

**Texas Bankers Association**

**P.O. Box 2569 • Austin, Texas 78768-2569**

**800-462-7295 / 512-472-8388 phone • 512-473-2560 fax**

**TBA members register online at [www.texasbankers.com/store](http://www.texasbankers.com/store)**

SW052 EMAIL1

CO-SPONSORED BY



Texas Bankers  
Association



Louisiana Bankers  
ASSOCIATION



ARKANSAS BANKERS  
ASSOCIATION



MISSISSIPPI  
BANKERS  
ASSOCIATION