



## **CBS BENEFITS DAY & HR CONFERENCE**

**March 21-22, 2018**

**Greensboro – High Point Airport Marriott • Greensboro, NC**

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### Wednesday, March 21 – CBS Benefits Day

9:30 – 10 am **Registration & Refreshments**  
Sponsored by: **HCMS GROUP**

10 – 11:15 am **Welcome and Renewal Remarks**  
Kim Hutchens – Executive Vice President, Community Bank Services  
Lauren Perry – Vice President, Community Bank Services

*Announcement of rates and benefits for the 2018-2019 benefit period. Participants will learn about key changes for 2018, open enrollment procedures and special programs available to employees. We will also address topics such as spousal surcharge and the proposed Cadillac tax.*

11:15 am – 12 pm **Virtual Care Anytime, Anywhere**  
Darin Moore – Vice President of Sales, MD Live

*Experience a live demo of the NCBA Health Benefit Trust's new telehealth benefit! Attendees will learn how MD Live can provide convenient, online visits with board-certified doctors, counselors, psychiatrists, and dermatologists from the comfort of their personal computer, device or phone.*

12 noon – 1 pm **Lunch**  
Sponsored by: **PALMETTO BENEFIT SOLUTIONS**

1 – 1:30 pm **Nutrition at Work**  
Garren Brannon – Owner, Make Every Bite Count

*Enjoy a lively presentation from Garren Brannon, registered nutritionist, dietitian and chef of Make Every Bite Count. Garren brings us tips and strategies for healthful meals/snacks at work, plus recommendations for eating out and on the go!*

1:30 – 2:15 pm **Wellness & Health Risk Management Solutions**  
Megane Savage – Health Risk Management Consultant, Scott Benefits  
Suzanne Supola – VP of Clinical Services Quality Management, HCMS Group

*Our risk management specialists will review innovative programs utilized by the NCBA Health Benefit Trust to control cost and improve the overall health of our population.*

2:15 – 2:45 pm **The Future of ACA & Current Events**  
Greg Stancil – Director of Healthcare Reform & Senior Account Executive, Scott Benefits



*Learn about recent legislative changes impacting healthcare and the future of the Affordable Care Act. Greg brings us insight to activity in Washington and has a great understanding of how regulations apply to employers.*

2:45 – 3 pm

**Networking Break**

Sponsored by: **EXPRESS SCRIPTS**

3 – 3:30 pm

**The Value of Voluntary Worksite Benefits and Effective Employee Communication**

Will Greene – Director of Sales, Palmetto Benefit Solutions

*Learn about voluntary benefit solutions from Colonial which can supplement traditional employee medical coverage. NCBA has entered into an exclusive arrangement with Palmetto Benefits to provide a first-class enrollment experience, custom products and administrative efficiencies.*

3:30 – 4 pm

**Retiree Benefits & Medicare**

Lauren Perry – Vice President, Community Bank Services

*Navigating Medicare can be challenging for employees and employers. Learn how Medicare coordinates with the group plan for active employees, retirees, and spouses and potential pitfalls with Health Savings Accounts. Review the Medicare “alphabet soup” and a FAQ to distribute to employees regarding Medicare enrollment options while covered under a group health plan.*

4 pm

**Adjourn**

6:00 – 7:30 pm

**Dinner**

Harper’s Restaurant

**Thursday, March 22 – HR Conference**

8 – 8:25 am

**Registration & Continental Breakfast**

Sponsored by: **SCOTT BENEFITS**

8:25 – 8:30 am

**Welcome**

Greensboro Room

Kim Hutchens – Executive Vice President, Community Bank Services

Lauren Perry – Vice President, Community Bank Services

8:30 – 8:45 am

**Is Your Group Disability Plan Discriminating Against Your Highly Compensated?**

George Davidson – Chief Executive Officer, Secura Consultants

*A Group Long Term Disability Insurance Plan (GLTD) is an important benefit for your employees. However, these plans typically discriminate against the highly paid employees of the bank. A new NCBA program will be discussed that integrates with a GLTD plan to more appropriately protect the key employees of the bank.*

8:45 – 9:30 am

**The Branch is Not Dead: Combining Technology & Human Interaction for an Intelligent Experience**

Anthony Burnett – Customer Experience Director, Level5, LLC

*On average, 84% of consumers surveyed by the Fed report using a branch, while respondents of Celent’s survey see 83% of DDA/savings accounts and 79% of non-mortgage lending products originated from the branch channel. Mobile only has a 2% share of total sales. These numbers do not support the notion that consumers are migrating away from the branch and towards mobile and digital only banking. But this doesn’t mean the branch should look the same as it did in the 90’s. This session will explore how financial institutions can achieve a more intelligent banking experience by combining technology with human interaction.*

9:30 – 10:30 am

**Preventing Domestic Violence/Intimate Partner Threat Spillover into the Workplace**

Felix Nater – President & Owner, Nater Associates, Ltd



*When a victim of domestic violence or intimate partner violence is employed – the threat of violence goes to the workplace and every employer pays the price. Yet at least 70% of employers do not have policies, plans or procedures in place to address this serious workplace violence issue. Often the challenges employers face lies in leadership’s resistance to the notion that workplace violence is not preventable or that homicidal violence can’t happen at their workplace. This form of denial places workplaces and employees are at greater risk. If the workplace culture doesn’t aggressively promote responsibility, accountability and consequences, the workplace will be more vulnerable to violence.*

10:30 – 10:45 am      **Networking Break**  
Sponsored by: **CBIZ FLEX-PAY**

10:45 – 11: 45 am      **Succession Planning for Success**  
Kim Snyder – President & CEO, KBS Results LLC

*Succession planning is moving to the top of the priority list for organizations who are facing an aging workforce, regulatory requirements and competition for talent from other industries. This informative session will discuss the succession planning process along with the obstacles and challenges that must be addressed along the way. This session will focus primarily on management succession planning – for those employees who “get it done” on a daily basis. We will discuss a roadmap to the development of a dynamic plan that will allow you to identify what talent is currently available, what talent may be leaving and how to prepare to capture the necessary knowledge and disseminate it to future successors.*

11:45 am – 12 pm      **Remarks from Pentegra**  
Wade Connor – Regional Marketing Director, Pentegra

12 – 1 pm      **Luncheon**  
**Sponsored by: PENTEGRA RETIREMENT SERVICES**

**A Young Banker, Defined**  
Meredith Begley – Corporate Secretary-Treasurer, Black Mountain Savings Bank  
Chairman, North Carolina Young Bankers

*Chairman of the North Carolina Young Bankers Division, Meredith Begley, will share information about this new division of the NCBA.*

1 – 1:45 pm      **Compensation Strategies for the New World**  
Flynt Gallagher – President, Compensation Advisors, Meyer-Chatifeld Group

*A key factor in a bank’s overall success is its long-term strategy. Looking beyond today and making critical compensation decisions regarding key employees will greatly influence the future of your institution. Designing compensation packages that are attractive to employees involves more than just offering competitive salaries and wages. Learn about current trends in compensation at community banks, examine solutions others have used to achieve financial goals and enhance shareholder value, and hear how compensation ties into management succession planning.*

1:45 – 2:30 pm      **Regulatory Update**  
Grainger Pierce – Member, Nexsen Pruet

2:30 – 2:40 pm      **Networking Break**

2:40 – 3:45 pm      **Round Table Discussion: Best Practices**  
Moderators: Kim Hutchens & Lauren Perry

*During this segment, attendees will participate in round table discussions that will cover a variety of hot topics in the industry.*

3:45 pm      **Adjourn**



**ADDITIONAL SPONSORSHIPS:**

Attendee Packets: **EXPRESS SCRIPTS**

Candy Basket: **STANDARD**

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