



6th Annual
Women in Banking Forum



MAY 23, 2013

Four Seasons Westlake Village



6th Annual Women in Banking Forum Thursday, May 23, 2013

FOUR SEASONS WESTLAKE VILLAGE

Program At-A-Glance

Thursday, May 23, 2013

8:30 a.m. – 9:00 a.m. **Registration and continental breakfast**

9:00 a.m. – 9:30 a.m. **Welcome**

Maurine Padden, EVP & COO
California Bankers Association

Mary Allis Curran, EVP and Chief Risk
Officer, Corporate Banking, Union Bank, N.A.
Past Chairman of the California
Bankers Association

9:30 a.m. – 10:30 a.m. **Keynote**

Pamela Joseph, Vice Chairman,
U.S. Bancorp Payment Services and
Chairman, Elavon, Inc.

10:30 a.m. – 11:00 a.m. **Break**

11:00 a.m. – 11:45 a.m. **Overview of California State
Financial Institutions**

Teresa Curran, SVP and Director,
Division of Banking Supervision
and Regulation
Federal Reserve Bank of San Francisco

11:45 a.m. – 12:45 p.m. **Lunch**

Sponsored by Harland Clarke

1:00 p.m. – 2:00 p.m. **The Art of Negotiation**

Dr. Yasmin Davidds, CEO/Founder,
Women's Institute of Negotiation

2:00 p.m. – 2:45 p.m. **Washington, D.C. Perspective**

Barrie Christman, Chairman,
President & CEO, Principal Bank and
Chairman, Government Relations Council
American Bankers Association

2:45 p.m. – 3:00 p.m. **Break**

3:00 p.m. – 3:45 p.m.

Building a Legacy: Leadership and Succession Planning

Anita Paige, Author, Professional Speaker and Master Facilitator; SVP, Edge Global Advisors

3:45 p.m. – 4:45 p.m.

Charting Your Future: A Panel Discussion

Barbara Hosaka, President & COO, Neighborhood National Bank;
Christa Steele, EVP/Wholesale Banking Manager, F&M Bank;
Kathleen Thomas, President, COO, Chief Policy Officer, Director, Greater Sacramento Bancorp

Moderated by **Anita Paige**, SVP, Edge Global Advisors

4:45 p.m. – 6:00 p.m.

Networking reception
Sponsored by Vantiv

SPECIAL THANKS TO OUR SPONSORS



Harland Clarke Corp. is a leading provider of integrated payment solutions, marketing services, technology solutions and best-in-class security to approximately 15,000 financial institutions, major investment firms, B2B clients, small businesses and individual consumers. The company's 5,300 employees work from a performance excellence business model to help financial service institutions of all sizes build sustainable and profitable relationships with their account holders.



Vantiv, is one of the most trusted and respected organizations in the payment processing industry, as well as the nation's largest PIN debit acquirer. They have driven many of the changes that prompted the shift from cash to electronic payments, and their innovative spirit continues to be a strength. Vantiv is changing the face of payments.

2013 Women in Banking Forum

Welcome to the California Bankers Association's sixth annual Women in Banking Forum, dedicated to celebrating women and their professional and personal successes. Take advantage of the opportunity to expand your network and influence your future by learning how to develop new strategies for success. Our lineup of speakers will provide an overview of trends in the banking industry, tips for career advancement and offer inspiration and empowerment. Join us at the networking reception immediately following the forum to connect with others and discuss your future plans.

Barrie Christman

Chairman, President & CEO, Principal Bank

Barrie Christman is chairman, president & CEO of both Principal Bank and Delaware Charter Guarantee & Trust Company dba Principal Trust Company, affiliates of The Principal Financial Group. Principal Bank was formed in February 1998, and focuses on consumer banking in all 50 states as a means of deepening relationships with Principal Financial Group's consumer and small-to-mid-sized business owner customers. Principal Trust Company is a non-depository trust company offering a variety of trust products both to affiliates and external customers. Christman is also a vice president in the retirement and investor services segment of The Principal. Christman joined The Principal in 2001 as president and CEO of the bank, and later was appointed chairman of Principal Trust Company. She was appointed to her current titles in both organizations in March 2013. Prior to joining the company, Christman was executive vice president of Huntington National Bank in technology businesses, and was previously president of Huntington's Northern Ohio region. She has been in banking almost 40 years, having worked for Bank One and Mellon Bank in various executive capacities before joining Huntington. She currently serves on the board of the American Bankers Association, and is chairman of its Government Relations Council. She also serves on the Chicago Federal Reserve District's Community Depository Institutions Advisory Council, and is past president of the Community Depository Institutions Advisory Council to chairman Ben Bernanke and the board of governors of the Federal Reserve in Washington, D.C., on which she served from 2009 through 2011.

2013 Women in Banking Forum

Mary Allis Curran

EVP, Chief Risk Officer, Corporate Banking, Union Bank, N.A.

In her position as chief risk officer for corporate banking, Mary Curran is responsible for a strong, proactive, integrated and effective risk management framework across all corporate banking business lines, including commercial banking, global treasury management, real estate industries, global capital markets and wealth markets. Her focus includes a heightened effort to ensure a balance between business objectives, client experience and effective risk management. With 28 years in financial services, Curran has held a number of executive leadership positions. Prior to assuming responsibility for corporate banking, she served as EVP of Union Bank's Private Bank, overseeing a staff of professionals that provided financial services to high-net worth individuals and families, business owners, corporate executives and professional services firms in 19 offices across California, Washington and Oregon. Prior to this, she was the market president for San Diego and Orange County commercial banking, serving middle market and corporate clients in Southern California. Active in the San Diego community, Curran is on the board of the San Diego Sports Commission and is a past chairman of the board. She also is on San Diego State University's Campanile Foundation Board of Directors. Additionally, she is the immediate past chairman of the California Bankers Association.

Teresa Curran

SVP and Director, Division of Banking Supervision and Regulation, Federal Reserve Bank of San Francisco

Teresa Curran oversees all financial institutions subject to supervision by the 12th Federal Reserve District. Additionally, she is a member of the bank's executive committee. She joined the reserve bank as Asia regional manager in 1995 with responsibility for building the division's expertise in Asian financial sector analysis. Throughout her tenure at the Federal Reserve, she has taken on increasing responsibilities. As assistant vice president, she led the foreign banking organizations unit and as vice president, she managed the policy, analysis and applications group. She was promoted to group vice president in 2002 and led the financial institutions group (2002-2010) and the supervision and risk group (2010-2011). She assumed her current responsibilities as SVP and director in May 2011. She continues to oversee the division's Asia program, which hosts the reserve bank's biennial international conference on Asian banking and finance. She recently completed an extended assignment to the Federal Reserve Board of Governors to coordinate implementation of the provisions of the Dodd-Frank Act related to savings and loan holding companies. Prior to joining the Federal Reserve, she served with the U.S. executive director at the Asian Development Bank in the Philippines, as an international financial analyst at the U.S. Department of the Treasury, and as a staff member of the Committee on Foreign Affairs (Subcommittee on Asia and Pacific Affairs) of the U.S. House of Representatives.

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Dr. Yasmin Davidds, PSY.D, M.C.C.

CEO/Founder, Women's Institute of Negotiation

Dr. Yasmin Davidds is an international best-selling author and negotiation expert specialized in teaching women the intricacies of effective negotiating. As one of the top leading female negotiation experts in the U.S. and Latin America, Dr. Davidds has trained and consulted thousands of corporate leaders in more than 200 blue chip companies throughout 22 countries in the art and skill of negotiation. Her clients have ranged from senior judges to tribal leaders, from unionized prison guards to accountants, and from railroad officials to diplomatic trainees. Her practical experience includes a wide range of public and private sector efforts in Brazil, Columbia, Argentina, England, France, Spain, South Africa and the U.S. She has helped lead intervention and assistance programs to disputing parties and has advised corporate, non-profit and governmental teams on how to prepare for important negotiations. As a leading negotiation public speaker, she has presented to Proctor and Gamble, General Electric, Wal-mart, Coca Cola, American Express, Johnson and Johnson, Microsoft and Apple, among many others. As a women empowerment specialist, she has conducted hundreds of presentations to organizations in some of the nation's most prestigious universities including Stanford, Harvard and the University of Southern California. Her commitment to the empowerment of women has brought her recognition and acclaims from the U.S. Congress, the California State Senate and the California State Assembly.

Barbara Hosaka

President & COO, Neighborhood National Bank

Barbara Hosaka joined Neighborhood National Bank in 2001 as interim chief financial officer. She later became the bank's EVP and CAO and currently serves as a member of the bank's board of directors. She has more than 42 years of experience in the banking industry. From 1975 to 2000, she served in various executive management capacities with Peninsula Bank of San Diego, ending her career with that bank as EVP and COO when it was sold in 2000. Hosaka served as president of the local chapter of the Bank Administration Institute for two years and is the treasurer of the United Portuguese SES Inc., a non-profit organization and past president and current director of the Cabrillo Civic Club #16 of San Diego. She served as the treasurer of the State Cabrillo Civic Clubs of California from 2003 to 2011 and is now serving as president, responsible for the monthly recording of the income and expense for the organization. Hosaka has also chaired numerous events for different non-profit Portuguese organizations.

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Pamela Joseph

Vice Chairman, U.S. Bancorp Payment Services and Chairman, Elavon, Inc.

As a member of the 14-member managing committee at U.S. Bancorp, Pamela Joseph is responsible for U.S. Bank retail payment solutions, corporate payment systems, Elavon global acquiring solutions and Elavon financial services, U.S. Bancorp's chartered European financial institution. Joseph is a 25-year veteran of the financial services industry. Before joining Elavon in 1994, she served with Visa International as director over new market development. Prior to her tenure with Visa, Joseph served for more than eight years in the banking industry with Wells Fargo Bank. In addition to her position at U.S. Bancorp, she is a member of the board of directors of Paychex, Inc. a provider of payroll, human resource and benefits outsourcing solutions, a member of the board of directors for Centene Corporation, a multi-line health services enterprise that administers state Medicaid programs, and chairman of Women Leaders in Action, a non-profit organization that funds the health, well-being and education of children in Africa.

Maurine Padden

EVP & COO, California Bankers Association

Maurine Padden is the chief operating officer for CBA. She previously served as CBA's chief administrative officer and also as its lead lobbyist in the most active state Legislature in the country. Padden continues to manage CBA's legislative advocacy efforts. Immediately prior to joining CBA in 1989, She was counsel for the State Teachers Retirement System (STRS), and also served as trial counsel for the Department of Industrial Relations.

Anita Paige

SVP, Edge, Global Advisors

Anita Paige is an accomplished business woman with more than 23 years of executive experience enabling organizations and individuals to learn and grow to their fullest potential. She is a motivational thought leader, author, professional speaker and master facilitator. She specializes in business culture transformation, leadership, individual effectiveness and team development. Paige has keynoted, consulted and master facilitated general sessions on respect, leadership, engagement, culture and inclusiveness at large corporations such as Boeing, state and local city governments including the City of Seattle, the City of Dallas proper and the National League of Cities, respectively. Her keynotes, seminars, coaching and consulting have been attended by thousands of leaders in prominent fortune 500 companies and leading national nonprofits from a myriad of industries.

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Christa Steele

EVP/Wholesale Banking Manager, F&M Bank

Celebrating 19 years in the banking industry, Christa Steele began her banking career as a part-time teller while attending college. Through the course of her career, she has held various consumer and commercial positions. Today, Steele is the EVP and wholesale banking manager at Farmers & Merchants Bank of Central California. Her job responsibilities include the oversight of a \$1.1 billion commercial loan portfolio, management of a seasoned commercial lending team, business development and government lending team, credit analysis team, treasury management team and a newly formed leasing company. Steele serves as a voting member of Farmers & Merchants Bank Senior Loan Committee and Asset and Liability Management Committee.

Kathleen Thomas

President, COO, Chief Policy Officer and Director, Greater Sacramento Bancorp

Kathleen Thomas is a director of the Greater Sacramento Bancorp, the holding company for Bank of Sacramento as well as the bank. She co-founded the bank in 1998. The wholesale bank serves the greater Sacramento region's business customers with approximately one half billion in assets. Previously, she held executive level positions with several independent banks in Sacramento and Northern California including Point West Bank, Bank of San Francisco, American River Bank, Capital Bank and Business and Professional Bank. Her primary focus has centered on credit risk, business development and the overall operation of these organizations. She has also served on the Sacramento Trade Organization (SACTO) finance committee, as a board member of Robert Morris Associates, and has been involved with the Arthritis Foundation, Roseville Rotary, Junior Achievement and Sacramento Business Volunteers for the Arts.

Educational Courses

Seminars

BSA/AML

June 4, 2013 – SFO

June 6, 2013 – Anaheim

Human Resources Conference

June 27, 2013 – Newport Beach

Enterprise Risk Management Seminar

July 11, 2013 – Huntington Beach

Accounting for Lenders

July 30 – 31, 2013 – Newport Beach

Writing an Effective Credit Memorandum

August 6 – 7, 2013 – Sacramento

FDIC Consumer Protection Workshop

August 21 – Newport Beach

FDIC Consumer Protection Workshop – Directors Role

August 21 – Newport Beach

Financial Statements and Tax Return Analysis

September 10 – 11 – Newport Beach

Safety & Soundness

September 17 – San Francisco

September 19 – Los Angeles

Banking Schools

Commercial Lending School 101: Loan Underwriting

June 17 – 21, 2013 – Sacramento

Regulatory Compliance School

August 12 – 16, 2013 – Carlsbad

For more information on education & training contact:

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Events and Conferences

June 11 - 13, 2013

Annual Visit to Washington, D.C.
Hay-Adams Hotel
Washington, D.C.

June 27 - 28, 2013

Security Management Conference
Sheraton Carlsbad Resort & Spa
Carlsbad, CA

October 8 - 11, 2013

35th Annual Regulatory Compliance Conference
Hyatt Grand Champions
Indian Wells, CA

November 7-8, 2013

Chief Credit Officers Symposium
The Clement
Monterey, CA

January 9 - 11, 2014

Bank Presidents Seminar
Four Seasons Biltmore
Santa Barbara, CA

March 16 - 18, 2014

27th Annual Lenders Conference
Rancho Las Palmas Resort & Spa
Rancho Mirage, CA

May 8 - 10, 2014

123rd Annual Convention of Bank Officers & Directors
Ritz-Carlton Laguna Niguel
Dana Point, CA

May 8 - 10, 2014

47th Annual Bank Counsel Seminar
Ritz-Carlton Laguna Niguel
Dana Point, CA

October 7 - 10, 2014

36th Annual Regulatory Compliance Conference
Sheraton Carlsbad Resort & Spa
Carlsbad, CA

For more information on upcoming conferences contact:

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