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|  | SuperCommunity Banks Retail Banking Agenda |
|  | Ritz-Carlton South Beach, Miami Beach, FL  September 22 – 23, 2022  (Casual attire; jeans welcome) |

# [Wednesday, September 21]

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| [5:45 PM] | Meet Anat in the lobby. Anat’s mobile: (916) 717-1710. |
| [6:00 PM] | Optional dinner offsite\*. |

# [Thursday, September 22]

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| [7:30 AM] | Breakfast |
| [8:00 AM] | Roundtable Discussion  • Bring 2-3 good ideas to share with the group  • Bring one best practice  • Discuss an example of what not to do (disasters)  • Bring questions you’d like to ask  • Incentive programs revisited – bring yours |
| [10:00 AM] | Break |
| [10:15 AM] | Discussions continued |
| [12:00 PM] | Working Lunch |
| [1:00 PM] | Organizing for success: regional vs. LOB; span of control of second tier of management; branch roles and responsibilities; feasibility of a relationship-focused personal banker |
| [1:45 PM] | M&A impact on retail |
| [2:30 PM] | The credit card business |
| [3:30 PM] | Adjourn |
| [5:45 PM] | Meet in the lobby. |
| [6:00 PM] | Dinner offsite\*. |

# [Friday, September 23]

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| [7:30 AM] | Breakfast – Topics for the next meeting |
| [8:00 AM] | Reducing operational tasks at the branch |
| [9:30 AM] | Break |
| [9:45 AM] | Retail as a partner for wealth, mortgage, TM etc. |
| [10:45 AM] | Revisiting branch optimization |
| [12:00 PM] | Adjourn |

\*Guests are welcome.