

California Banking For 2024: Are You Ready?

DECEMBER 2023

Wednesday, December 6:
SAN FRANCISCO ST. REGIS HOTEL

Friday, December 8:
ANAHEIM MARRIOTT HOTEL

Tuesday, December 19:
RECORDING PLAYBACK*
**For BCG Members Only*

Additional Topics To Be Discussed:

- Recent Developments in Corporate Governance
- Consumer Lending Regulatory Update
- Banking Operations & FinTech Hot Topics
- Commercial Lending Update
- Top 10 Risk Management Issues for 2024

California Banking Trends Keynote Speakers:



Greg Young
Senior Deputy Commissioner
for Corporations and
Financial Institutions

California Department of Financial
Protection & Innovation



Aaron Prosperi
Deputy Commissioner, Banking
California Department of Financial
Protection & Innovation

Other Speakers:

Mark E. Aldrich, Keith R. Forrester, Anne M. McEvilly, Joel N. Cook,
Principals of Aldrich & Bonnefin, PLC*
Harijot "Harry" S. Khalsa, Associate and
Andrew J. Litchy, Assistant BCG Manager of Aldrich & Bonnefin, PLC*

MATERIALS

BCG Members: We are updating Standard Procedures Manual #17, Managing Financial Institutions, in connection with this Seminar. BCG Members will receive the updated SPM through their membership subscription to Compliance Companion® by the first week of January 2024.

RECORDING PLAYBACK: Registrants will receive an email two business days prior to their Seminar date with login information and will receive a second email when their pin is activated and the Seminar materials are available to download. There will be no live Q&A for the Keynote Speakers during the Recording Playback.

IN-PERSON SEMINARS: Registrants for the In-Person Seminars will receive an email at least two business days prior to their Seminar date with the Seminar Agenda & Discussion Outline to download and bring to the Seminar.

Hard copies of the Seminar Agenda & Outline will not be provided at the Seminar.

REGISTRATION (Playback Registration is for BCG Members only)

BCG Members: Seating is limited, so register early by contacting your institution's BCG Main Contact, or if you are authorized, log in at <https://register.bankerscompliancegroup.com>.

For the playback, members are allowed to register an unlimited number of attendees.

For in-person locations, members can register up to 20 attendees.

Non-members: The non-member registration fee is \$1,250 for each registrant. Non-members will not receive the SPM 17 manual. To attend this Seminar, pre-registration and confirmation is mandatory. Non-members may pay by credit card or check. To pay by credit card, follow the credit card instructions during the online registration process. Major credit cards are accepted. To pay by check, make checks payable and mail to Aldrich & Bonnefin, PLC, P.O. Box 19686, Irvine, CA 92623-1029, and indicate the event you are registering for.

REGISTRATION DEADLINES

San Francisco St. Regis – Wednesday, November 29 ♦ Anaheim Marriott – Friday, December 1 ♦ Recording Playback – Thursday, December 14

Cancellation Policy for Non-members: We will fully refund your registration fee if we receive your written cancellation request on or before the applicable Registration Deadline listed above. If we receive your cancellation request after this deadline but before the Seminar date, we will charge you a \$50 administrative fee and refund the balance of your registration fee. If you do not cancel before the Seminar date, your registration fee is nonrefundable.

SEMINAR SCHEDULE

The Seminar will run from 8:30 a.m.—3:00 p.m., with a short morning break and a lunch break.

HOTEL INFORMATION

The St. Regis San Francisco

A standard room is \$595 (plus taxes) per night. This rate is available for online booking only until Monday, November 6. After this date, you will receive the best rate available at the time of booking.

125 Third Street San Francisco, California 94103

Anaheim Marriott

A standard room is \$189 (plus taxes) per night. The rate is available for online booking only until Friday, November 17.

700 West Convention Way, Anaheim, California 92802

Hotel parking will be validated for daytime self- and valet-parking only for at each location. Overnight hotel parking will not be validated.

ACCREDITATION (Continuing education credit will be provided only to the registrant)

MCLE: Aldrich & Bonnefin, PLC certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing MCLE. This activity has been approved in the amount of 4.75 hours.

CRCM: American Bankers Association (ABA) Professional Certifications has approved California Banking for 2024: Are You Ready? for: 6.5 CRCM credits. APPROVED NON-ABA CE search for training will appear as: Aldrich & Bonnefin, PLC | California Banking for 2024: Are You Ready?

CPE: Aldrich & Bonnefin, PLC follows Continuing Education (CE) regulations as outlined in the California Accountancy Act. Certified Public Accountants and Public Accountants may obtain continuing education credit. This activity is eligible for 4.75 hours of CPE Continuing Education credit.

REFRESHMENTS AND LUNCH

Continental breakfast and sit-down lunch will be provided. If an attendee has special dietary needs, such as a vegetarian meal, or a disability requiring accommodation, please contact Katrina Jensen at info@bankerscompliancegroup.com or 800-742-3600.

SPECIAL DRAWING

We will hold a drawing at the end of each in-person Seminar for three excellent prizes. You must be present to win. Drawings will only be held at the live events.