



1303 J Street, Suite 600, Sacramento, CA 95814
CalBankers.com

2024 Events

Annual Conference and Directors Forum

Fairmont Orchid, Hawaii
Island of Hawaii, HI
April 19-22, 2024

Bank Counsel Seminar

Virtual | Online | TBD

Women In Banking Forum

Caesars Palace | Las Vegas, Nevada
September 30-October 1, 2024

Bankers Summit

Caesars Palace | Las Vegas, Nevada
October 1-4, 2024



2023 Annual Report

Uniquely equipped to empower our banking institutions and move the industry forward

Navigating today's challenges in our industry can be difficult.

We are surrounded by change in consumer habits, in the competitive and regulatory environment, and in technology and trends.

Today, banks and bankers must be more ready and nimble than ever.

Since 1891, California Bankers Association has been here to take on those challenges and help our banks prosper. Standing up for our interests in Sacramento and Washington, DC. Sitting at the table with each other to learn, engage the day's toughest issues, and exchange ideas. Preparing the executives of today and tomorrow. These are the things that can only be tackled when all of us do our part and come together for a common purpose.

Whatever the size or how we go to business, together as California Bankers Association we are uniquely equipped to empower our institutions and move this industry forward. That's a responsibility we take seriously.

As we look ahead, we are happy to share highlights and successes from the past year.



The support of our valued members has truly made a difference in advancing our goals. Thank you once again for being an integral part of our association. Together, we are shaping the future of our industry and are confident that the successes of 2023 are just a glimpse of what we can achieve this year.



Advocacy

CBA's legislative, regulatory, and judicial advocacy is our core competency. As a tireless advocate, we help manage the evolving political environment and implement strategies to minimize risk for our association members.

The Past Year At-A-Glance

Overall, the banking industry had a good legislative year. We stopped several harmful measures that sought to increase liability for banks or impose complicated new compliance burdens. We tackled difficult issues like making banks liable for elder financial abuse committed by others, increasing scrutiny on the use of automated decision-making, and mandating the handing over of confidential customer information on client trust accounts.

Despite a successful year, the governor signed two climate-related measures impacting certain entities doing business in California. One measure requires annual reporting of Scope 1, 2 and 3 greenhouse gas emissions and the second requires the submission of a biennial climate-related financial risk disclosure. Realizing these measures would be signed into law, the advocacy team worked to reduce compliance and legal risk.

We supported a measure to create a regulatory framework for digital assets and cryptocurrency providers doing business in California, and another to provide law enforcement greater access to vital records when investigating elder financial abuse.

Communications

CBA promotes a positive banking image to the media through press releases, relationships with reporters, and social media platforms.

Social Media Engagement

CBA has a strong, engaged social media presence.

- ▶ We leveraged social media to highlight our volunteer leadership, including the newly appointed members of our executive committee and board of directors.
- ▶ We shared posts celebrating member bank achievements and expressed our perspective on pending legislative and regulatory matters.

Publications

CBA's *CaliforniaBanker* magazine was revamped in 2023. With a new look and feel, the magazine features bank members on the cover and includes a Q&A article highlighting their professional journeys, advice to those beginning their careers and important issues facing the industry. The magazine also features new members, industry and association updates, and much more.

CBA also updated the weekly newsletter. The CBA Weekly's "Three Things to Know" section, provides association and industry news and updates. Since implementing the new section, the open rate and engagement numbers have grown substantially.

Events & Peer Networking

CBA's signature events and conferences provide annual updates for member bank employees at all levels on hot topics, emerging trends, and innovative ways to enhance profitability and reduce risk. They also provide an invaluable opportunity to network with peers and stay current on important issues affecting our rapidly evolving industry.

Meaningful In-Person Forums

CBA hosted three successful signature events including Bank Presidents Seminar, Annual Conference, and Bankers Summit. In addition, CBA held two successful Women in Banking events that drew more than 300 women bankers, and a virtual forum for bank directors.

Education

CBA has developed partnerships with the industry's leading educators to provide a robust menu of educational programs designed specifically for bankers.

In addition, CBA expanded its offerings with the Branch Manager Bootcamp, Frontline Branch Service, and ABA training programs.

