



2011 Human Resources Conference

March 22 & 23
Embassy Suites Hotel & Conference Center,
Murfreesboro, TN

Who Should Attend

Human resources professionals and support staff, branch managers, and supervisory personnel

Agenda – Tuesday, March 22

- 8:30 am Registration/Continental Breakfast**
- Oakleigh Foyer
**Continental breakfast sponsored by
Financial Products & Service, Inc,
Nashville, TN**
- 9:00 am General Session - Oakleigh AB**
Call to Order
*Fran Turner, TBA Human Resources
Committee Chairman and Vice President
Human Resources, Northeast Tennessee
Region, BancorpSouth Bank, Jackson*
- 9:30 am How to Engage Staff, Inspire Managers,
and Enjoy Life in Turbulent Times**
*Barbara Sanfilippo, CSP, CPAE, High
Definition People®, San Diego, CA*

Downsizing, outsourcing, devalued investments, foreclosures – it's all taking a psychological toll on employees and customers in just about every industry. For many, these circumstances have led to fear of losing their job, a loss of control over their lives, uncer-

tainty, stress, anxiety, and disillusionment. For many organizations, the consequences have been a loss of productivity, revenue, and profit. Employees have become distracted, less committed, and less inclined to take personal responsibility.

The good news is even in these difficult times it is possible to turn anxiety into action. More than ever, we all need help to make wise choices, keep a positive outlook, and take responsibility for our career and future well being. In this idea-packed and entertaining program, Sanfilippo will share ideas and proven principles you can apply to engage employees, improve job satisfaction, be an inspirational coach, and most of all, help you and your staff embrace a success mindset regardless of circumstances. You'll leave inspired and armed with ideas to encourage employees and make an impact both professionally and personally.

10:45 am Break - Oakleigh Foyer

continued on the next page

2011 Human Resources Conference

Agenda continued

11:00 am **Understanding Health Care Reform and Its Impact on Your Business**
- Oakleigh AB
Teresa K. Culver, Of Counsel, and Thomas Anthony (Tony) Swafford, Member, Miller & Martin, PLLC, Nashville, TN

This session will include an overview of health care reform, especially as it affects employers. We will address legislative updates and recently issued regulations and will focus on the impact the Patient Protection and Affordable Care Act has on your business both now and in 2014.

Noon **Lunch - Oakleigh C**
Sponsored by The Ross Group at Morgan Stanley Smith Barney, Memphis, TN

1:15 pm **Concurrent Workshops**
Workshop 1 - Oakleigh AB
Ben Franklin Was Right...An Ounce of Prevention Is Worth a Pound of Cure: Investing in Human Capital in the Wake of Health Care Reform
Teresa K. Culver, Of Counsel, Miller & Martin, PLLC, Nashville, TN; Ted Fritzen, Insurance Consultant, Financial Products and Services, Inc, Nashville, TN; and Brent Turner, President, Prevention Planning Group, LLC, Lebanon, TN

This workshop will focus on one of health care reform's ultimate goals—affordable, comprehensive health care for all, via preventive care. This panel will show employers how investing in wellness and prevention for their most valuable assets—their employees—pays dividends in productivity and reduced medical expenses by reducing the overall burden of risk. The discussion will include a detailed analysis of the prevention components of the Patient Protection and Affordable Care Act—colloquially known as health care reform—and the related regulations and guidance that have been and will continue to be issued by the Department of Health & Human Services, as well as the Departments of Labor and Treasury. We also will review various plan options as they relate to wellness programs. *If you have specific questions on health care reform, please submit them on your conference registration form in advance of the program date, and they will be addressed in this session.*

Workshop 2 - Broadlands AB
The Department of Labor's Interpretation of Nonexempt Status of Mortgage Loan Officers and the Implementation of the SAFE Act
Bruce E. Buchanan, Attorney, King & Ballow, Nashville, TN

This workshop will cover two important new employment topics related to mortgage loan originators/officers: the Department of Labor's administrator's interpretation on their nonexempt status under the Fair Labor Standards Act and the necessary registration under the Secure and Fair Enforcement for Mortgage Licensing Act (SAFE Act). We will discuss the new interpretation as well as avenues to explore to continue to achieve exempt status for mortgage loan originators/officers. We also will discuss the registration process and the requirements for banking institutions to adopt and to assure compliance with the SAFE Act.

Workshop 3 - Cambridge AB
Opportunities for Improvement or Time to Move On? Practical Advice for Dealing with Employee Discipline and Terminations
Tony Swafford, Member, Miller & Martin, PLLC, Nashville, TN

This workshop will provide hands-on advice for dealing with employee discipline, including performance evaluations, discipline for poor performance, and dealing with various forms of workplace misconduct. It will focus on measures to help change undesirable conduct or performance in an effort to build a strong team. Swafford also will examine practical guidelines for dealing with those situations where it is necessary to end the employment relationship due to performance, misconduct, or economic reasons. This discussion will include a review of various separation agreements.

2:30 pm **Break - Oakleigh Foyer**

2:45 pm **Concurrent Workshops**
Workshops 1-3 Repeat

4:00 – 5:00 pm **Reception - Oakleigh C**
Sponsored by Financial Products & Service, Inc, Nashville, TN

Wednesday, March 23

8:00 am Registration/Continental Breakfast
- Oakleigh Foyer
Continental breakfast sponsored by Elite Financial Products, Inc, Clarksville, TN

8:30 am General Session - Oakleigh AB
Call to Order
Fran Turner, TBA Human Resources Committee Chairman and Vice President Human Resources, Northeast Tennessee Region, BancorpSouth Bank, Jackson

8:45 am DOL Wage Hour Issues Audit
R. Eddie Wayland, Attorney, King & Ballow, Nashville, TN

The financial services industry has become a prime target for legal challenges under the federal wage hour law and regulations. Banks and other financial institutions across the country have been sued repeatedly as traditional employee classifications and pay practices increasingly come under attack. In this session, Wayland will provide an overview and discussion of areas that have been subject to legal challenges. In addition, the session will focus on a possible DOL wage hour audit of your bank, what you should expect, and what you can do to prepare. Is your bank ready if the wage hour division or if a plaintiff's lawyer comes knocking?

10:00 am Break - Oakleigh Foyer

10:15 am These People Drive Me Crazy! Headache Remedies and Other Pain Relievers for Supervisors - Oakleigh AB
Honey Shelton, President, InterAction Training Systems, Humble, TX

Some days it just doesn't pay to get out of bed! Have you ever said that? Most of us that deal with the public find there are just some people that can drive us crazy! This session will provide excellent coaching tactics on dealing with the challenging people issues that frequent the workplace. Shelton will examine the groundwork that must be laid in your branch or your department in order for you to help negative or difficult people see that what they are doing isn't working. If you are ready to put an end to allowing people to sabotage teamwork or not pull their load to create turmoil, this program is for you! You will enjoy hearing one of the nation's top coaching trainers discuss ideas and solutions for improving communication, teamwork, production, and morale. Have your pen handy as you take notes on how not to allow others to drive you crazy.

11:30 am Break - Oakleigh Foyer

11:45 am Investing in Human Capital: Health=Wealth - Oakleigh AB
Brent Turner, President, Prevention Planning Group, LLC, Lebanon, TN

Focusing on the health of your employees in tough economic times just makes good sense. Investing in wellness and prevention for your most valuable asset pays dividends in productivity and reduced medical expenses by reducing the overall burden of risk. Using the most advanced clinical approach, today's prevention plans focus on keeping the healthy employees healthy and identifying the underlying risks before symptoms occur and costly procedures and lost time are required. Employers that create an ecosystem of wellness and prevention are rewarded with healthier employees who are more productive and cheaper to insure. This final session will be a working lunch presentation that focuses on the most up-to-date resources an employer would need to get the most out of their human capital.

Boxed lunches sponsored by US Preventive Medicine, Lebanon, TN

12:15 pm Conference Adjourns



Elite Financial Products, Inc.
A Full Service Company

Morgan Stanley Smith Barney

FINANCIAL PSI
FINANCIAL PRODUCTS & SERVICES, INC.

THE PREVENTION PLAN™
From U.S. Preventive Medicine™

Thank You to Our Sponsors

The Ross Group at Morgan Stanley Smith Barney, Memphis, TN – March 22 Luncheon

Financial Products & Services, Inc, Nashville, TN – March 22 Continental Breakfast and Reception

Elite Financial Products, Inc, Clarksville, TN – March 23 Continental Breakfast

US Preventive Medicine, Lebanon, TN – March 23 Boxed Lunches

2011 Human Resources Conference

Speakers



Bruce E. Buchanan is a partner in the labor and employment section and partner-in-charge of the immigration section of King & Ballou. He has served as the editor of the firm's *Employment Law Comment* for over three years. In addition, Buchanan is the current editor of the Tennessee Bar Association's *Labor and Employment Law Newsletter* and vice-chair and editor of that association's *Immigration Law Section Newsletter*.

Buchanan received his law degree from the Vanderbilt University School of Law and his undergraduate degree from Florida State University, where he graduated *magna cum laude*. Prior to joining King & Ballou, he worked for 20 years as senior trial specialist for the National Labor Relations Board. From 1991 to 2003, Buchanan also served as adjunct professor at William H. Bowen UALR School of Law, teaching courses in labor law, employment law, and sports law.



Teresa K. Culver is Of Counsel with Miller & Martin, PLLC. She has been actively involved with health care entities for over 15 years and concentrates her practice in the areas of health law, including Stark compliance, fraud and abuse, EMTALA, HIPAA, and other regulatory/operational matters. Culver advises health care employers regarding the myriad of labor and employment issues confronting health care providers. She also represents hospitals and health systems, physician groups, health care corporations, and a variety of other health care providers.

Culver earned her JD from the University of Kentucky College of Law, her MSW degree from Washington University, and her BS degree, *cum laude*, from Murray State University. She is admitted to the bar in the District of Columbia, Florida, Kentucky, and Tennessee.



Ted Frizen is an insurance consultant with Financial Products and Services, Inc, TBA's wholly owned subsidiary, where he has served banks and other businesses for the past six years. Prior to joining Financial PSI, Frizen spent 14 years in various positions in the insurance industry. He is a graduate of Carson-Newman College.

Based in the San Diego area, **Barbara Sanfilippo**, CSP, CPAE, is a popular and dynamic national and international keynote speaker, workshop leader, author, and



consultant in financial services and other industries. Her firm, High Definition People, engages and inspires people to excel at whatever they do and become more valued to their employer. Sanfilippo partners with community banks to ignite employee passion, deepen customer relationships, create inspired leaders, and bring the spirit of service alive.

She is the author of *Dream Big! What's the Best That Can Happen?* And contributing author in *The Service Path: Your Roadmap to Build Strong Customer Loyalty*.

Sanfilippo is one of only 93 speakers worldwide to have both the certified speaking professional designation and the Speaker Hall of Fame awarded by the National Speakers Association.



Honey Shelton is president of Interaction Training, which she founded in 1983. She brings the best of both worlds to her speaking and training engagements. Shelton has 25 years of experience as a training and quality improvement consultant for banks and banking associations across the country. Over a half-million bankers have participated in her programs.

Shelton's banking background includes spending three years as executive vice president/chief retail banking officer with First Victoria National Bank. A graduate of the School of Bank Marketing at the University of Colorado, she invests time as a faculty member for banking schools around the country and is recognized as a *BankersOnLine.com* (BOL) guru.

Shelton is a member of the American Society of Training and Development and currently is pursuing a self-study program on Six Sigma. She also obtained certification from the Training and Development Program at Texas A&M and in reality therapy from the William Glasser Institute.



Thomas Anthony (Tony) Swafford is a member of Miller & Martin, PLLC. He concentrates his practice on labor and employment as well as transportation and logistics. Chairman of Miller & Martin's labor and employment department, he represents national and regional clients in a wide range of both litigation and transactional matters. Swafford has successfully defended union organizing attempts in 14 states covering all regions of the country. Additional

work includes practicing before the National Labor Relations Board and the National Mediation Board.

Swafford earned his JD from Case Western University School of Law and his BS degree from the University of Tennessee. He is a member of the American, Tennessee, and Nashville bar associations and the Transportation Lawyers Association.



Brent Turner, president of Prevention Planning Group, LLC, has been a financial advisor for the past 20 years and is also a managing general agent for US Preventive Medicine (USPM). He has been involved with the development of USPM since 2005 and currently assists with the distribution of “The

Prevention Plan” by contracting and assisting employee benefit brokers around the country to bring the most comprehensive wellness program to their clients.

Turner is a graduate of the University of Tennessee at Martin.



R. Eddie Wayland is a partner in the law firm of King & Ballow, Nashville, where he supervises the firm’s litigation section. He has argued before the US Supreme Court and has litigated hundreds of cases to conclusion before judges, juries, arbitrators, and administrative agencies in over 30 states

throughout the country. Wayland concentrates his national practice in the representation of management in all areas of employment and related litigation. He is a frequent speaker on employment law issues and provides in-house training in this area.

Wayland has been listed in the book *The Best Lawyers in America* in the area of employment and labor law for over 16 years. He was founder and editor of the Tennessee Bar Association’s *TBA Labor Letter*. Among his other publications, Wayland is co-author for the *Americans with Disabilities Act Compliance Guidebook* text and was a contributing author for the text, *The Developing Labor Law*.

He earned his law degree from the University of Tennessee College of Law, graduating Order of the Coif with high honors, and was articles editor for the *Tennessee Law Review*.

2010-2011

Human Resources Committee



Fran Turner

Chairman: Fran Turner, Vice President Human Resources, Northeast Tennessee Region, BancorpSouth Bank, Jackson
Stacy Adams, Vice President/Human Resources Officer, Heritage Bank & Trust, Columbia

Bonnie Autry, Vice President, Carroll Bank & Trust, Huntingdon

Kathy Barber, Executive Vice President/

Human Resources Director, First State Bank, Union City
Jody Beason, Director of Human Resources, Citizens Bank, New Tazewell

Evon Chastain, Vice President/Human Resources, Cornerstone Community Bank, Chattanooga

Michelle Davis, Vice President/Human Resources Director, Southern Heritage Bank, Cleveland

Debbie Durham, Vice President, Human Resources, First Volunteer Bank of Tennessee, Chattanooga

Ted Frizen, Insurance Consultant, Financial Products and Services, Inc, Knoxville

Amy Harrison, Assistant Vice President/Human Resources & Marketing, Greeneville Federal Bank, FSB, Greeneville

Sharon Jones, Vice President, Human Resources Manager, Citizens Bank, Elizabethton

Jeanette Kramer, Vice President/Human Resources, Legends Bank, Clarksville

Nancy Locke, Vice President, Human Resources & Marketing Manager, The First National Bank of McMinnville, McMinnville

Renee Morris, Assistant Vice President/Human Resources Director, Farmers and Merchants Bank, Trezevant

Catherine Nave, Vice President/Human Resources Director, Tennessee State Bank, Pigeon Forge

Michael Patterson, First Vice President/Human Resources, Mountain National Bank, Sevierville

Sandra K. Phillips, Assistant Vice President/Executive Administrative Assistant/Customer Services Manager, Peoples Bank & Trust Company, Manchester

Lynn Ray, Senior Vice President/Director of Human Resources, F & M Bank, Clarksville

Debbie Richards, PHR, Senior Vice President/Director of Human Resources, Bank of Tennessee, Johnson City

Paula Rugel-Gibson, Vice President/Marketing & Human Resources Officer, First Peoples Bank of Tennessee, Jefferson City

Thomas Anthony Swafford, Member, Miller & Martin, PLLC, Nashville

Laurie Willoughby, Human Resources Manager, The Hardin County Bank, Savannah

R. Eddie Wayland, Attorney, King & Ballow, Nashville

Hotel Information

The conference will be held again this year at the Embassy Suites Hotel & Conference Center, located at 1200 Conference Center Boulevard in Murfreesboro, TN. Perfectly situated adjacent to the new Avenue Murfreesboro lifestyle center, the hotel is convenient to the area's best restaurants and shops. All rooms are suites, and guest rates include a complimentary cooked-to-order breakfast every morning and nightly manager's reception. The hotel is connected to a beautiful new conference center, where all general sessions and concurrent workshops will be held.

The TBA has arranged for a limited number of rooms at a special group rate of \$135 single/double. To reserve accommodations, please contact the hotel directly at 615-890-4464 or the Embassy Suites brand reservations number at 1-800-EMBASSY (362-2779), and specify that you are attending the *Tennessee Bankers Human Resources Conference* to qualify for the special group rate.

The reservation deadline for the special rate is **midnight on March 1, 2011**. When the allotted room block is sold, room rates will return to standard prices on a space-available basis, even if it is before the March 1 deadline. Please make your overnight arrangements early to assure you receive the TBA special rate.

DIRECTIONS TO HOTEL

Take I-24 to Murfreesboro, take Exit 76 (Manson Pike/Medical Center Parkway) off I-24, and take a right on Conference Center Boulevard.

Fee Information

	TBA Members / Associate Members	Nonmembers
Early Registration	\$300	\$600
<i>Early registration deadline is March 8.</i>		
Registration	\$325	\$625
At-the-Door	\$350	\$650

Fees include instructional materials, continental breakfast, and refreshment breaks both days; full lunch Tuesday and boxed lunch Wednesday; and the reception on Tuesday. Please register early. **At-the-door registrants will be assessed an additional \$25 late registration fee.**

No written confirmation of seminar registration will be sent from the TBA.

Participation in TBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or nonmember rates.

Additional Information

No advance preparation required
Method of Delivery – Group-live
Program Level – Intermediate
No prerequisites are required

Continuing Education Credit

Attendants qualify for 9 hours of Continuing Professional Education (CPE) credit in the area of Personnel/HR. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. For more information regarding administrative policies or complaints, please contact our offices at 615/244-4871.

Tennessee Bankers Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org

For additional continuing education credit information, call the TBA education department at 800/964-5525 or 615/244-4871.

General Information

Attire: Business casual attire is appropriate for all TBA programs. Because of temperature variations in meeting rooms, please bring a sweater or jacket for your comfort.

Program Availability: Due to hotel guarantees and material production, reservations received less than 7 days before the program will be subject to space and material availability.

Special Needs: If you have a disability that may affect your participation in this program, please send TBA a statement regarding any special needs at least 10 days before the program. We will contact you to discuss accommodations.

Cancellation Policy: Cancellations received in the TBA office 7 business days prior to the scheduled program will be refunded in full. Due to commitments with hotels, cancellations received less than 7 business days prior to the scheduled program are not refundable. Substitutions are welcome. Registrants who do not attend the program or send a substitute will be responsible for the entire registration fee.

Inclement Weather Policy: Cancellations due to inclement weather are refundable, minus a late cancellation fee of \$50 for a one-day program and \$75 for a two-day program. If you have questions concerning the status of a TBA program due to inclement weather, please call the TBA office at 615/244-4871 or 800/964-5525, x150. The TBA number will provide information concerning program status, cancellation fee, and refund requests. You may call the site where the program is being held to check the status of the program in your area. The site phone number is listed in this brochure.



For more information, please contact
Susan Taylor, CMP – srtaylor@TNBankers.org
Vice President/Director of Professional Development
Tennessee Bankers Association,
615/244-4871 or 800/964-5525,
or visit our website at www.TNBankers.org.



2011 Human Resources Conference

March 22 & 23
Embassy Suites Hotel & Conference Center,
Murfreesboro, TN

 Register online at www.TNBankers.org

Please print or type. List name and badge nickname for each attendant.

Name: _____	Nickname _____	E-mail _____	SS# _____
Name: _____	Nickname _____	E-mail _____	SS# _____
Name: _____	Nickname _____	E-mail _____	SS# _____
Name: _____	Nickname _____	E-mail _____	SS# _____
Name: _____	Nickname _____	E-mail _____	SS# _____

MUST BE INCLUDED For educational tracking purposes only.
SS# _____
SS# _____
SS# _____
SS# _____
SS# _____

Company _____ Contact _____

Address _____ Contact E-mail _____

City _____ State _____ Zip _____ Phone _____ FAX _____

TBA Members / Associate Members		Nonmembers
Early Registration	\$300	\$600
<i>Early registration deadline is March 8.</i>		
Registration	\$325	\$625
At-the-Door	\$350	\$650

Submit questions for Workshop 1 – Ben Franklin Was Right...An Ounce of Prevention Is Worth a Pound of Cure: Investing in Human Capital in the Wake of Health Care Reform – Teresa Culver, Ted Frizen, and Brent Turner (Must be submitted prior to conference date.)

TOTAL: \$ _____

Method of payment: VISA MasterCard Check Ck# _____ Please make check payable to Tennessee Bankers Association.

Card # _____ Exp Date _____

Name as appears on card (please print) _____

Card billing address _____

City _____ State _____ Zip _____

Signature _____



Return completed form and payment to:
Tennessee Bankers Association
Attn: Monique Jenkins
211 Athens Way, Ste 100
Nashville, TN 37228-1381
Phone: 615/244-4871
or 800/964-5525
FAX: 615/324-1990