



American Bankers Association  
an ABA subsidiary

# Best Practices Panel Descriptions

The ABIA Best Practices Panels were established as an informational and networking resource for the membership. Each panel provides a peer-to-peer resource in the panel's area of specialization to assist ABIA members in identifying opportunities and resolving problems. ABIA members are encouraged to join a panel(s), or contact the ABIA if they have an issue they would like to discuss with the panel experts. Please check the box next to the panel(s) to receive notices of upcoming sessions. Then, complete the requested information below.

**Agency Integration**

This panel is designed to help agencies through the integration process of a bank acquisition—from both sides. This panel provides a peer group forum to discuss important issues such as cultural differences arising from the merger/acquisition process and guiding financial institutions with the management and integration of bank and insurance agency information systems and post-integration issues.

**Annuities**

The scope of this panel is directed toward the unique function of sales and marketing of fixed and variable annuities in the financial institutions market.

**Community Bankers**

This panel looks at the unique perspectives—agent and banker—of selling insurance in the community bank environment.

**Compliance**

This panel helps banks and insurance agencies with the complex compliance issues members face daily. Our informative panel sessions focus on current compliance issues, and include invited speakers who share knowledge and expertise, along with input from members on these important topics.

**Credit Insurance/Debt Cancellation**

This panel deals with the complex issues surrounding debt cancellation and credit insurance for financial institutions including regulatory, training, marketing, product design and operational issues.

**Direct Marketing**

The Direct Marketing Panel reviews case studies from industry practitioners across a variety of topics. Topics focus on industry challenges such as generating fee income from insurance and membership products, telemarketing restrictions and regulations, and customer segmentation, among other topics.

**Life Coverages**

This panel is exploring new techniques to successfully sell life insurance through the bank channel while carefully matching the sale to the bank customer.

**P&C Coverages**

The P&C Panel handles all Property and Casualty issues in a bank-owned agency. The issues range from financial scoring to mold to rating systems and e-filings.

**Risk Management/Reinsurance**

This Panel seeks to help members understand the important and under-utilized reinsurance function as a source of additional income for a bank-insurance operation and aids members to develop their essential risk management priorities. The Panel will also discuss compliance and operational issues related to reinsurance arrangements and general risk management opportunities.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

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