



TREASURY MANAGEMENT PERSPECTIVES SEMINAR

March 30 | 8:45 a.m. - 4 p.m. | Virtual Event

This virtual program will provide the participants with treasury management product and service perspectives to aid in business retention, expansion and acquisition. Treasury management delivery models and best practices will be discussed. Current industry trends, emerging products, the quickly changing cast of competitors and the strategic direction of the treasury management/payments business line will be reviewed.

This program is approved for 6 CPE credits.

TOPICS

- The Treasury Management Industry – How Did We Get Here? Where Are We Going?
- TM Delivery Best Practices
- TM Sales Professionals – Characteristics of Top Performers
- Aligning Your TM Sales Team
- Trends Shaping the Payments Industry – Products, Competitors and Partnerships
- Focused TM Sales Tips
- Relationship Acquisition, Expansion and Retention – Best Practices
- Vertical Market Opportunities
- Setting Your TM Strategic Course

MEET THE PRESENTER



Debra E. Knox, CCM
Senior Treasury Management Professional
Knox Advisors

Debra E. Knox, CCM, has a direct, intimate knowledge of the financial services industry based on many years of experience in customer contact and treasury product positions at all levels. She currently manages a consulting company working with financial institutions and specializing in treasury management services. Knox Advisors, LLC, was created in March 2016 to assist banks with B2B product delivery and relationship building.

Members: \$325 | Affiliate Members: \$385 | Non-Members: \$488

Visit www.pabankers.com to register today.

Jackie Catalano | jcatalano@pabankers.com | (717) 255-6939