



Financial Managers SCHOOL

September 22 – 26, 2025 • Madison, WI

Presented by:



Graduate School of Banking
at the University of Wisconsin - Madison



As the economic and regulatory environments continue to change, it's vital that financial services CFOs, controllers and other finance and accounting executives have a solid foundation in asset/liability management. The Financial Managers School provides this foundation through this unique, hands-on immersion program designed to provide you with workable strategies to meet your institution's regulatory and financial performance objectives.

The Financial Managers School goes beyond the basics offering a learning environment aimed at giving you the practical tools you can bring back to your institution and implement immediately. You'll learn innovative concepts and terminology of bank finance and asset/liability management as well as test practical implementation tools to help you profitably manage your institution's balance sheet, enhance your strategic planning, and better communicate new strategies to your board and ALCO.

PROGRAM CONTENT*

The Financial Managers School offers a unique, hands-on learning environment where you will use your own institution's data to enhance learning. The comprehensive agenda will cover, but is not limited to:

- Develop an effective capital planning strategy that adapts to change and uses an A/L model to evaluate risk
- Analyze peer and trend analysis to develop a risk management profile with effective measures and goals
- Examine interest rate risk and the measurement systems of gap, duration, dynamic income at risk, static and dynamic value at risk
- Communicate financial information to management for responsible decisions on investment policy
- Evaluate liquidity risk management strategies and funding options
- Examine effective credit risk management including loan policy, tracking issues, and integration with the ALCO process
- Price loans using benchmark securities
- Install an effective deposit pricing process with decision-making tools for choosing the best retail and wholesale funding options
- Make better decisions by measuring the profitability of the organization/lines of business/product development/ customers

*The above content is based on curriculum covered at the 2024 Financial Managers School and is subject to modification

WHO SHOULD ATTEND

CFOs and others in senior management actively involved in the financial management responsibilities of small- to medium-sized financial institutions. Financial managers who have day-to-day experience with ALM, investments, budgeting and reporting activities will benefit from this in-depth peer and process immersion in ALM.

ADDITIONAL INFORMATION

A comprehensive program overview, curriculum description and online registration form are available on the GSB website: gsb.org or the FMS website: FMSinc.org/school

THIS PROGRAM SELLS OUT YEAR AFTER YEAR, SO ENROLL EARLY TO BENEFIT FROM TOP-NOTCH INSTRUCTORS, ENGAGING CURRICULUM AND EXCEPTIONAL NETWORKING

“ I found the school extremely informative and more in-depth than other programs. The information gained is instantly relevant and useful as soon as you get back to your institution plus the relationships and contacts I met have been great for follow up. ”

“ Loved the real world examples to help explain complex topics! ”

“ The most valuable part for me was putting together the entire puzzle of banking & discovering how all the pieces fit together and affect one another. ”

“ Dave's ability to tie various subjects together helped me determine how things all work together. I would gladly listen to Dave and his ideas anytime. ”



Educate. Advocate. Grow.