



The Path to Peak Performance

 ips sendero

US PATH 2007

June 3 - 6
The Phoenician
Scottsdale, AZ

Register at www.ips-sendero.com

Performance-Driven Solutions
 25
years

Follow the Path to Peak Performance

Financial institutions pursue business strategies based on their own unique goals and philosophies. Though their paths are usually different, their business needs are similar. The need for powerful tools...reliable business intelligence...insights into industry best practices and trends...and access to other experienced financial practitioners for fresh ideas.

IPS-Sendero has proudly supported the performance needs of more than 3,400 financial services organizations during the last 25 years. As institutions faced challenges and opportunities, they adapted, changed and grew. IPS-Sendero did too – from a niche software company to the leading global provider of corporate performance management solutions to financial institutions.

While our collective past is important, the focus of US Path 2007 is on pushing forward. New markets, demographics, technology and regulations have opened new routes to success. And while peak performance still demands stamina and endurance, it also requires new efficiencies, new strengths and new perspectives. In recognition of our 25th anniversary, we've listed the top 25 advantages of US Path 2007– advantages to help minimize hurdles and accelerate progress on the path to peak performance.

Performance-Driven Solutions

25
years



25 Reasons to Join Us for US Path 2007

IPS-Sendero has spent the past 25 years building our company into a global provider of solutions exclusively for financial institutions. We have also built US Path into **1 the industry's largest risk, profitability and performance management conference**. Not sure if you're up for it? Keep reading...

The need for **2 corporate performance management (CPM)** is simple. Financial institutions of all sizes need integrated technologies and processes to efficiently and effectively plan, monitor and manage their business strategy and provide insight into their business performance. CPM is the path to peak performance. IPS-Sendero is the path to CPM.

For the past quarter century, IPS-Sendero has led the way in performance driven solutions that keep financial institutions profitable. From risk management to profitability measurement to compliance and accounting, our solutions deliver results to help you travel the path to peak performance, CPM and success.



What You Can Expect From US Path 2007:

New Look. New Format. New Path.

IPS-Sendero has a fresh look. We've also freshened up our conference. We have adopted a slightly **new format for US Path 2007** that will allow you to attend more key sessions.

Begin your Path experience with our **pre-conference sessions** on ILP and FTP. Beautiful Camelback Mountain provides the backdrop as you visit with your colleagues at **The Warm Up, Sunday evening's welcome reception**. On Monday, take **The Early Lead at the opening general session**. In addition to IPS-Sendero's experts, you will hear from your peers about their experiences with our newest products, Vantage and Prologue. During this opening session, you will be treated to our first keynote speaker, **Tom Davenport**.

A world-renowned thought-leader, Tom Davenport has helped hundreds of companies revitalize their management practices. He holds the President's Distinguished Chair in Management and Information Technology at Babson College while serving as Director of the Working Knowledge Research Center, and the Institute for Process Management. He has written or co-authored 13 best-selling business books, including the current "Competing on Analytics: The New Science of Winning," and has been named the third leading business-strategy analyst by Optimize Magazine, one of the top 25 consultants in the world by Consulting Magazine and one of 10 "Masters of the New Economy" by CIO. A truly dynamic speaker, Davenport will discuss "Competing on Analytics: How Fact-Based Decisions and Business Intelligence Drive Performance."



After taking **The Early Lead**, you can expect:

- **8 exciting and informative session tracks** – as in the past, educational sessions will be offered in risk, profitability, and management planning and reporting — all in support of CPM.
- **9 presentations from your peers and hands-on experts** will bring you powerful case studies and instructional presentations from which you'll gain practical techniques and ideas

As we make **10 The Final Sprint – the special, expanded closing session** – you will be exposed to even more new ideas and industry issues, including a mock board meeting that demonstrates the value of corporate performance management solutions in decision-making and reporting. Former White House economic advisor **11 Todd Buchholz** follows, offering an insider's perspective on how reporting and strategizing influence the actions and performance of Washington's power centers.

A former White House director of economic policy and past managing director of the \$15 billion Tiger hedge fund, Todd Buchholz has both crafted economic policy as a public servant and invested in the market. Buchholz is a contributing editor for Worth magazine as well as the critically acclaimed author of "Market Shock: Nine Economic and Social Upheavals that Will Shake Our Financial Future," "New Ideas from Dead Economists" and "From Here to Economy." Named one of the "21 Top Speakers for the Twentieth Century" by Successful Meetings Magazine, Buchholz entertains audiences, showing them how to thrive in a chaotic economy, while gearing up for prosperity.



During the **12 post-conference training** on June 7 we will offer advanced workshops on instrument level processing, funding center analysis and risk adjusted return on capital.

As in years past, plan on attending **group or individual product demonstrations**. These various product demos let you see the solutions in action and give you the knowledge you need to better utilize IPS-Sendero products.

Also, between visting with your peers during **networking breaks**, make time to visit the IPS-Sendero **software center**. Here you will receive hands-on, face-to-face attention for any issues or questions you may have about IPS-Sendero solutions.

Need more reasons to join us? Here they are...

16 The Phoenician

We are proud to host US Path 2007 at The Phoenician in Scottsdale, Arizona. This AAA Five-Diamond luxury resort, located at the base of Camelback Mountain in Arizona's Valley of the Sun, is known for its lavish décor and breathtaking surroundings. IPS-Sendero has negotiated a special rate of \$195 per night (plus portorage and applicable taxes) for conference attendees. Reservations should be made via the IPS-Sendero web site. Rooms available at this rate are limited, so register early!



New Products and Services

Learn about the newest products from IPS-Sendero – **Vantage** and **Prologue** – and hear why many current users are calling them “light years” above anything else in the marketplace while the level of detail they provide “let’s me see precisely how much I can grow.” The accurate data and flexible tools in Vantage help financial institutions achieve their A/L management, planning, budgeting and reporting objectives. The Prologue suite of financial accounting products provides the accurate accounting data that provides a solid foundation for CPM.

US Path 2007 Events

19 Golf Tournament

Sunday, June 3, 7:30 a.m. – 12:30 p.m.
Desert and Canyon Golf Course

Enjoy the pristine desert views and lush tropical scenery as you play one of the best courses in the country. Breakfast and lunch will be served.

20 First-Time Attendee Mixer & Orientation

Sunday, June 3, 6 – 7 p.m.
Mary Elaine's Restaurant

Is this your first US Path conference? Step in for cocktails and conversation with IPS-Sendero's management team at the First-Time Attendee Mixer prior to the opening reception. We'll give special attention to your questions about the conference and IPS-Sendero.

The Warm Up Welcome Reception

Sunday, June 3, 7 – 10 p.m.
East Fountain and Croquet Lawn

Enjoy the evening sunset and entertainment as IPS-Sendero welcomes you to US Path 2007. Mix and mingle with your peers and other industry professionals while taking in the beautiful desert scenery from The Phoenician's croquet lawn.

21 A Night at Garduno's

Monday, June 4, 7 – 11 p.m.
Garduno's Margarita Factory

Join us for an authentic Mexican experience at Garduno's Margarita Factory! Voted the best Mexican restaurant in Arizona for the past three years, Garduno's offers fantastic Mexican cuisine along with world-famous margaritas. Enjoy Gardunos' wonderful mariachis, authentic Mexican folk crafts and a margarita luge.

22 A Night on Your Own

Tuesday, June 5, 4 p.m. until...

Tuesday night is yours to explore other activities at The Phoenician or other areas of **beautiful Scottsdale, Arizona**. Restaurants of all kinds await you. Whether you like dance clubs or fine dining, there are more than enough selections to satisfy you.

23 Club Path

Sunday, Monday and Tuesday
10 p.m. to midnight · Las Brisas and Patio

Can't sleep? Stop by Club Path for after-hours entertainment. Visit with your colleagues while you enjoy beverages, billiards and games!

Utilize our **easy, online registration** to reserve your spot at US Path 2007! Simply visit **www.ips-sendero.com** to register for four days of education packed with 25 years of experience from the industry leaders.



CONFERENCE SCHEDULE AT A GLANCE

(B) Beginner
(I) Intermediate
(A) Advanced

RISK	PROFITABILITY	MANAGEMENT PLANNING & REPORTING
CROSSTRACK		

SUNDAY, JUNE 3	7:30 a.m. - 12:30 p.m.	Golf Tournament		
	12 - 6 p.m.	Speaker Rehearsals		
	12 - 6 p.m.	Registration		
	2:30 - 5 p.m.	Theory and Applications of Instrument Level Processing (I) Tom Bowers (The IPS-Sendero Institute), Joe Keyser (IPS-Sendero), James Pesnell (IPS-Sendero)	Building Blocks of World Class FTP (B) Orlando Hanselman (The IPS-Sendero Institute)	
	6 - 7 p.m.	First-Time Attendee Mixer & Orientation		
	7 - 10 p.m.	The Warm Up Welcome Reception		
	10 p.m. - 12 a.m.	Club Path		

MONDAY, JUNE 4	7:30 - 8:30 a.m.	Networking Breakfast		
	8:30 - 12:15 p.m.	The Early Lead - featuring business-strategy analyst and author Tom Davenport and a special introduction to IPS-Sendero Vantage and IPS-Sendero Prologue		
	10 a.m. - 4 p.m.	Product Demonstrations by Appointment		
	10 a.m. - 6 p.m.	Software Center Open		
	12:15 - 1:30 p.m.	Networking Lunch		
	1:30 - 2:45 p.m.	Risk Management for Value Creation (I) Sam Srinivasulu (KESDEE, Inc.)	Strategic and Practical Guidance to Risk-Adjusted Return on Capital (B) Orlando Hanselman (The IPS-Sendero Institute)	CPM: How to Ensure that your Plans Perform (A) Don Shaurette (IPS-Sendero), Mike Thompson (IPS-Sendero)
		Core Deposits: Theory vs. Practice (I) Fred Poorman (ALM Network), Dorothy Jaworski (First Federal of Bucks County)		Advanced Management Reporting in Vantage (B) (hands on) Joyce Roberts (IPS-Sendero)
		Understanding Consumer Behavior: Redefining Model Back Testing (A) John Molenda (Del Norte CU)	Branch Profitability Measurement (I) John Kim (IPS-Sendero)	Tips & Tricks: Getting the Most Out of Prologue (B) Brian Dart (IPS-Sendero)
		Using Funds Transfer Pricing Results to Increase Net Interest Margin (I) Dave Dufresne (IPS-Sendero)		
	2:45 - 3:15 p.m.	Networking Break		
	3:15 - 4:30 p.m.	Model Validation - A View from the Trenches (I) Stephen Wheatley (Federal Reserve Bank of Chicago)	Process Improvement Through ABC (I) Valarie Conner (IPS-Sendero)	Vantage Panel Discussion: True Stories (B) Don Shaurette - moderator (IPS-Sendero)
		Strategic Balance Sheet Management (I) Jeremy Taylor (National Credit Union Administration)	RPM Under the Hood (B) Bob Amodeo (IPS-Sendero)	Building Powerful Financial Reports in Prologue (I) Dan Oberg (IPS-Sendero)
		Interpreting the Meaning of Risk Management/ALCO Reports (B) LaChrisha Dourisseau (IPS-Sendero), Bill Corsnitz (IPS-Sendero)		Preparing MPC for a New Budget Season (I) Ann Weiner (IPS-Sendero)
7 - 11 p.m.	A Night at Garduno's			
10 p.m. - 12 a.m.	Club Path			

TUESDAY, JUNE 5	7:30 - 8:30 a.m.	Networking Breakfast		
	8:45 a.m. - 6 p.m.	Software Center Open		
	8:45 a.m. - 4:45 p.m.	Product Demonstrations by Appointment		
	8:45 - 10 a.m.	Hedging Interest Rate Risk Using Derivatives (BI) Chad McKeithen (Echo Partners)	Leveraging Customer Profitability Information (I) Connie Loveland (Washington Trust Company)	Managing Performance at FirstBank Southwest (I) Jerry Williams (FirstBank Southwest), David Horlock (IPS-Sendero)
		How Basel 1A Will Affect Your Capital and Risk-Weighted Assets Calculations (IA) Virginia Garcia (Fiserv CBS), Ron AndIKasim (IPS-Sendero)		Formula Building and Consolidations in MPC (I) (hands on) Dennis Lyons (IPS-Sendero)
		Interpreting the Meaning of Risk Management/ALCO Reports (B) Bill Corsnitz (IPS-Sendero), LaChrisha Dourisseau (IPS-Sendero)		Basic Precepts for Perfecting Your Strategic Roadmap (I) Anita Newcomb (A.G. Newcomb & Co)
		From Wall Street to Main Street: How Investors View Bank Stocks (I) Eric Hoerner (Greenleaf Financial Group, LLC)		
	10 - 10:30 a.m.	Networking Break		
	10:30 - 11:45 a.m.	A/L Roundtable (BIA) Bill Corsnitz (IPS-Sendero), Kurt Heinrich (IPS-Sendero), Jeff Wood (IPS-Sendero)	Customer Profitability Touchpoints Roundtable (I) Conny Bregar (IPS-Sendero), Steve Light (IPS-Sendero)	CPM: How to Ensure That Your Plans Perform (A) Don Shaurette (IPS-Sendero), Mike Thompson (IPS-Sendero)
		Building and Utilizing an In-house Prepay Model (I) Jerry Hubbard (FTN Financial), Jim Douglas (FTN Financial)	Approaches and Challenges to Transfer Pricing Non-Maturity Deposits (I) Tom Bowers (The IPS-Sendero Institute)	Driver-Based Planning in Vantage (I) Mike Sumner (IPS-Sendero)
				What's New in MPC? (I) Mary Mote (IPS-Sendero)
	11:45 a.m. - 1 p.m.	Networking Lunch		
	1 - 2:15 p.m.	What's Next in IPS-Sendero A/L? (BI) Dan O'Neill (IPS-Sendero), Ron AndIKasim (IPS-Sendero)	Driving Shareholder Wealth by Maximizing Customer Lifetime Value (I) Orlando Hanselman (The IPS-Sendero Institute)	Margin Planning in MPC (I) (hands on) John Kim (IPS-Sendero), John McCaffrey (North Fork Bank)
		Why Duration Measures Often Fail Risk Managers (A) Bruce Klassen (Concentra Financial)		Dashboards and Scorecards for the FSO (B) John Osteig (IPS-Sendero)
How to Leverage Funds Transfer Pricing and Asset/Liability Management to Take Charge of Your Balance Sheet (B) Beth Clowers (IPS-Sendero), LaChrisha Dourisseau (IPS-Sendero)				
2:15 - 2:45 p.m.	Networking Break			
2:45 - 4 p.m.	Liquidity Management: Best Practices in Measurement & Reporting (I) Fred Poorman (ALM Network), Leonard Matz (Liquidity Risk Advisors)	Let There Be Light: The Truths Discovered by a Customer Profitability Process (B) Keith Knudsen (Security National Bank)	MPC Panel Discussion: True Stories (B) Mary Mote - moderator (IPS-Sendero)	
	Assumption Management in the Predictive Modeling of Indeterminate Deposits (I) John Molenda (Del Norte CU), David Horlock (IPS-Sendero)	Role of the Funding Center In Profitability Analysis (I) Tom Bowers (The IPS-Sendero Institute)	Margin Planning in Vantage (I) Mike Sumner (IPS-Sendero)	
	How Basel 1A Will Affect Your Capital and Risk-Weighted Assets Calculations (IA) Virginia Garcia (Fiserv CBS), Ron AndIKasim (IPS-Sendero)		Tips & Tricks in EIS (I) Lee Ann Sumner (IPS-Sendero)	
4 p.m. until...	Night on Your Own			
10 p.m. - 12 a.m.	Club Path			

WEDNESDAY, JUNE 6	7:30 - 8:45 a.m.	Networking Breakfast
	8 - 10 a.m.	Software Center Open
	8:45 - 11:15 a.m.	The Final Sprint - Featuring former White House Director of Economic Policy Todd Buchholz presenting “The Inside Story of the White House, the Fed and Congress”, and a mock board meeting supported by CPM
	11:15 - 11:45 a.m.	Prize giveaway/closing remarks

THURSDAY, JUNE 7 POST-CONFERENCE	9:30 a.m. - 1 p.m.		Funding Center Analysis Workshop (IA) Tom Bowers (The IPS-Sendero Institute)	
	9:30 a.m. - 3:30 p.m.	ILP: Simulation Richness in the Detail (I) Virginia Lu (IPS-Sendero), Matt Foreman (IPS-Sendero)	RAROC: The North Star for Management & Measurement - A Case Study Workshop (I) Orlando Hanselman (The IPS-Sendero Institute)	

Registration Information

Fees, Registration Discounts and Deadlines

Conference dates: June 3 – 6, 2007

Post-conference workshops: June 7, 2007

Registration fee: \$1475

Early bird tuition (on or before April 11): \$1375

Post-conference registration fee: \$400

Golf tournament entry fee: \$170

Spouse/Guest Fees

The Warm Up Welcome Reception: \$100

A Night at Garduno's: \$155

Register at
www.ips-sendero.com

Registration Fees Include:

- Scheduled networking breakfasts and breaks on Monday, Tuesday and Wednesday
- Scheduled luncheons on Monday and Tuesday
- The Warm Up Welcome Reception on Sunday and A Night at Garduno's on Monday
- Club Path
- All scheduled conference sessions Sunday through Wednesday
- A comprehensive conference package containing session handout materials
- Conference gifts

Registration Fees Do Not Include:

- Fee for the optional Sunday golf tournament: \$170
- Breakfast, lunch or evening events for spouses/guests
- Optional post-conference training sessions

NASBA Sponsorship

IPS-Sendero 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, Nashville, TN 37219-2417. Contact NASBA by phone at 615-880-4200. No course information may be obtained at this number.

Possible CPE Credit Hours

Pre-conference seminar: 3

Conference sessions: 16

Post-conference seminar:

ILP: 6

RAROC: 6

Funding Center Analysis: 4

IPS-Sendero Thanks the Sponsors of Path 2007



Interactive Data

