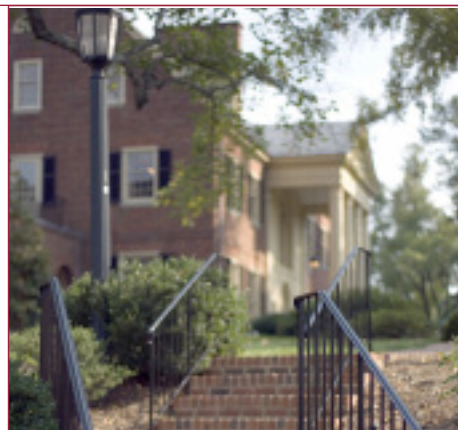


University of North Carolina
Chapel Hill, North Carolina
July 7 – 14, 2010



2010 Leadership Development Program



BEN ROSEN, PhD. Faculty Director, AFSA Management Development Program



Dear Financial Services Executive:

The need for talent never dies! Investing in the development of your organization's future leaders will pay dividends for years to come. The AFSA Educational Foundation in partnership with the University of North Carolina's Kenan-Flagler Business School offers an outstanding leadership development opportunity. We are pleased to announce that the **AFSA Management Development Program** will be offered on July 7-14, 2010.

In recent years, we have completely redesigned the management development experience. To accommodate the busy schedules of today's up and coming leaders, the program has been condensed from two weeks to six intensive days. The new, fast-paced format allows participants to immerse themselves in cutting edge principles of management and leadership through class discussions, case analyses, and simulations, including an outdoor team building exercise. The new format received rave reviews last year and will be even better in 2010. Here are some of the highlights of the 2010 Program:

- Learning the responsibilities of leadership, including articulating a vision and communicating the vision with passion and urgency.
- Creating a plan for strategic change and receiving immediate feedback on employee buy-in in the context of a challenging computer simulation.
- Developing an ethical "rule of thumb" for making business decisions quickly and effectively.
- Mastering critical negotiation skills including "principled negotiation", "interest based negotiation" and "win-win" negotiation.
- Building confidence in the ability to make dynamic and persuasive presentations
- Analyzing strategic decision-making in the context of two new cases in the financial service industry.
- Experiencing first-hand the dynamics of building trust, collaborating and creating an effective team.

Beyond the class room, participants have ample opportunity to expand their professional networks, benchmark best practices across the industry, and build lasting personal friendships.

The program takes place at the Paul J. Rizzo Conference Center in Chapel Hill, an unparalleled facility for world class executive development. Set in a 28 acre wooded environment near the University of North Carolina campus, the state of the art complex is a self contained learning community. Leading edge instructional technology and expert technical support, and a relaxed retreat environment provide an ideal learning environment for executives. The facility includes a modern residential complex complete with swimming pool, health club, and an elegant dining and social center.

We encourage you to invest in the future leadership of your organization and sponsor your "best and brightest" managers.

Sincerely

A handwritten signature in black ink that reads "Ben Rosen". The signature is fluid and cursive, written in a professional style.

BEN ROSEN

Faculty Director

AFSA Leadership Development Program

AFSA LEADERSHIP DEVELOPMENT PROGRAM

DAY 1: MANAGING AND LEADING

BEN ROSEN

*Hanes Professor of Management
PhD., Wayne University*

Great managers begin by learning to manage themselves effectively. Self-management requires a clear sense of priorities and the discipline to stay focused on those activities that add value to the organization. Beyond self management, successful managers quickly learn that they cannot do everything themselves. Rather, they must learn to delegate, empower and build high performance teams.

While managers are responsible for meeting short term goals, leaders are expected to be visionaries who see the handwriting on the wall before their competitors even see the wall. Leaders focus on the future, communicate goals with a sense of urgency, shape the culture and push for change. It is the leader's responsibility to position the organization for long term success.

Specifically, participants will learn:

- To set priorities and manage time effectively
- To delegate and empower their direct reports
- To build high performance teams
- To develop and communicate a vision statement
- To help shape a corporate culture
- To position their organizations to gain a competitive advantage

DAY 2: STRATEGY ISSUES CASES

PAUL N. FRIGA

*Professor of Organizational Behavior
PhD, UNC Kenan-Flagler*

Strategy demands vigilance, an understanding of the environment and a view to the future. To manage strategy, think about CLASS – Culture, Leadership, Alignment, Structure and Systems.

In this session, participants will examine two case studies of firms in the financial services industry and consider the strategic decisions made by top executives and the consequences of these decisions for various stakeholders including, customers, stockholders, employees, and regulators.

DAY 2: ETHICS

TBD

Managers are selected for executive development because they have demonstrated a great potential for leadership. As they rise within the organizational ranks, one of the inevitable challenges that they will face is the increasingly complex set of decisions that include a mix of management, finance, accounting, marketing and other issues.

Inevitably included within these decisions will be a huge component of ethical issues that test the fundamental principles of the company and the individuals within the company. Moreover, leaders often have to make decisions on the fly, with little time to reflect on ethical nuances.

To meet this challenge, this session will focus on the following points:

- Addressing when an issue becomes one that requires ethical decision-making skills
- Assessing which ethical theories make the most sense for business decision-makers
- Analyzing how one makes ethical business decisions
- Analyzing a real-life business case that carries major ethical concerns
- Developing an ethical "rule of thumb" for making ethical decisions quickly and effectively



MARK ROLAND President and COO World Acceptance Corporation

"The AFSA – UNC Leadership Development Program has been an integral part of World Acceptance Corporation's

continuing education curriculum for over 15 years. Our senior and middle-level executive operations personnel have consistently rated this program as excellent, providing an opportunity to learn from industry experts through challenging course work and case studies. In addition, UNC is an exceptional forum to meet and engage with peers in the industry while establishing relationships that are often beneficial for their entire career."

AFSA LEADERSHIP DEVELOPMENT PROGRAM

DAY 3: DEVELOPING AND DELIVERING PROFESSIONAL PRESENTATIONS

HEIDI SCHULTZ

*Professor and Director, Management and Corporate Communication
PhD, University of North Carolina at Chapel Hill*

Leadership requires mastering the art of effective persuasion. Leaders must be able to communicate both within and outside the organization clearly, concisely, and convincingly.

Through lecture, discussion, exercises, and practice, this session will help participants refine their presentation skills by covering the following topics:

- Organizing presentations effectively and efficiently
- Designing and integrating PowerPoint slides, notes, and questions into presentations effectively
- Delivering information with confidence

DAY 4: OUTDOOR TEAM BUILDING EXERCISE

Every manager recognizes the importance of building cohesive, productive and resilient teams. Key components of team building include excellent communication among members, high levels of trust, norms of collaboration, and dedication to achieving the team's goals. Through a series of challenging outdoor exercises, participants will develop new insights on teamwork and collaboration.



LINDA WELLS
*Vice President
CitiFinancial*

"It is always both exciting and fulfilling to see the advances our participants in the AFSA Leadership Development

Program make after completing the program. They bring back new knowledge, ideas, excitement and enthusiasm, which help to drive their businesses to new heights. It is also rewarding to know that the program is reviewed and updated on a regular basis to make certain participants have exposure to the latest ideas, trends and opportunities."

DAY 5: NEGOTIATIONS

ALISON FRAGALE

*Assistant Professor of Organizational Behavior
PhD, Stanford University*

Most business executives lack confidence as negotiators. When queried, they often indicate a dislike of negotiating because they dislike conflict, hate confrontation, don't think quickly on their feet, and cave too quickly to the other side's demands. This session will address these fears and misgivings, with an explanation of what actually works in negotiation and what rarely works. The primary focus will be on learning the techniques of what is often referred to as "principled negotiation," "interest-based negotiation," or simply "win-win" negotiation. We explore how these techniques are usually superior to more attack-oriented negotiation approaches, but we also learn how to deal with those who approach bargaining with a "win-lose" attitude.

Because negotiation is a skill, rather than simply a body of knowledge, we do a substantial amount of learning by engaging in negotiation exercises. In summary, we address the following topics in the following ways:

- Why even good negotiators think they are ineffective
- What the studies show to be the attributes of good negotiators
- What the techniques are for "principled negotiation," "interest-based negotiation," also known as "win-win" negotiation
 - How to open a negotiation and how to conduct a negotiation
 - Tips and techniques of great negotiators
 - Reflections on negotiations conducted during the day's session

AFSA LEADERSHIP DEVELOPMENT PROGRAM

DAY 6: EXPERIENCE CHANGE SIMULATION

BEN ROSEN

*Hanes Professor of Management
PhD., Wayne University*

Every executive has been a part of organizational change, both as a leader and as a participant. Yet, many change efforts don't produce the desired effect that those leading the change effort wished for. This common issue has resulted in significant research with practical implications for managers and executives who want to increase the likelihood of the change initiative having lasting results.

This session will draw on both the research and experience of the executives on ineffective and effective strategies for change management and overcoming resistance to change. A key component of this session will be a simulation where participants will work in teams as consultants for a technology company that has had declining revenues and profits. Each team's goal is to navigate the change process to enhance the company's chances for improved competitiveness and survival. After the simulation, participants will tie theory to practice and leave with practical tools and strategies to add to their "management database".

Key concepts include:

- Developing a structured approach to diagnosing, planning, and implementing organizational change
- Analyzing and discussing practical tools to help executives lead change
- Test thinking on managing change, using a change management simulation
- Applying lessons on managing and leading change that apply to each executive's area of responsibility
- Discussing strategies for leading change that draw from both research and experience
- Creating effective strategies to manage resistance to change

JERRY BURKE Key Talent Manager Deere & Company



"The AFSA 2010 Leadership Development Program delivers a top-notch learning program for emerging leaders. It is a must for anyone needing Leadership training or enhancing their leadership knowledge. Uniquely tailored, the content is delivered by world-class instructors from the University of North Carolina. Great leadership is the result of being inspiring and ethical, being effective with management style and being able to communicate well. Leadership is about being able to lead teams and make sound decisions that are respected. All of these characteristics are taught in the AFSA Leadership Development Program. If you want to invest in your people and ultimately have your people become extraordinary leaders, then the 2010 program can be an effective learning opportunity. Simply put – you will not find a better instructed, well designed and valuable leadership development opportunity anywhere."



JOE CHERRY 2009 Class President 1st Franklin Financial Corp Region Operation Director

"My experience at the AFSA Leadership Development Program was great. I had the pleasure of meeting and working with 16 enthusiastic teammates and a group of motivating instructors to have a week of interesting and challenging topics. We were able to share ideas, expand our knowledge, and improve our skills."

The ropes course was very instrumental in bringing out our ability to work as a team and it really drove home the point that we should all be aware that putting the team before our own interests improved our performance.

I would highly recommend this course to anyone interested in improving their management style and ability."

GENERAL INFORMATION & REGISTRATION

ENROLLMENT

Open to individuals associated with financial services, including diversified financial institutions, consumer and sales finance companies, credit card companies, retail companies, auto finance companies, and independently-owned and operated finance companies.

CERTIFICATE

Participants who successfully complete the requirements of the program will be awarded a certificate of completion and Continuing Education Units (C.E.U.s). **Attendance at graduation on Tuesday night July 13th is a mandatory requirement to complete the program.**

ARRIVAL/DEPARTURE

Participants should plan to arrive on July 7th, Wednesday. No activities are planned for Wednesday evening; classes begin on Thursday morning. Departure can be scheduled for Wednesday morning, July 14th.

AIRPORT

Raleigh/Durham International Airport is the nearest airport to Chapel Hill. Transportation to the Rizzo Center is available by reservation with Brad's Shuttle Service (919) 493-5890 or 1-800-467-3302. The cost for this service is \$66 per person round trip. If using Brad's, please identify yourself as an Executive Education participant to receive a discount. Taxis

are available outside of the baggage claim area with a \$35 charge one way. Rental car companies are located at the airport. The airport is 20 minutes from the Rizzo Conference Center.

ACCOMMODATIONS

Participants will be staying at the Paul J. Rizzo Conference Center at Meadowmont. The center, set in a 28-acre wooded environment, provides an ideal setting for learning. The state of the art facility is comprised of three separate buildings—Loudermilk Hall contains the classrooms; McLean Hall offers 120 guest rooms, three seminar rooms, study rooms with telecommunications ports, and a full health club; and DuBose House, a Georgian Revival house, serves as a social center.

DRESS/CLIMATE

Business-casual attire such as sports shirts and long pants is appropriate for class sessions. Athletic wear is necessary for the Ropes Course. Daytime temperature can range from the mid 80s-90s with moderate humidity. Evening temperature is in the mid-60s.

KENAN-FLAGLER BUSINESS SCHOOL

Registrants will receive information in early June from Denise Smith, UNC Executive Program Manager.

REGISTRATION DEADLINE – APRIL 30, 2010

PROGRAM FEE: \$6,800

(FEE MUST BE PAID IN FULL BY JUNE 4, 2010)

The fee includes all instructional materials, classroom facilities, housing for 7 nights, transportation to program activities, 4 evening dinners (Thursday, Friday, Monday and Tuesday), breakfast and lunch each day.

\$500 DEPOSIT REQUIRED

- Payment of \$500 deposit and registration form enclosed.
- Full payment and registration form enclosed.

CANCELLATION POLICY

Due to the fact that enrollment will be limited and participants will be required to read articles, books and case studies in advance, cancellations must be submitted in writing and are subject to the following policy:

- **Cancellation of enrollment or substitutions will be accepted on or before May 10, 2010; a full refund will be issued with the exception of the \$500 deposit.**
- **No refunds will be made after May 10, 2010; substitutions will be accepted.**

REGISTRATION

REGISTRANT INFORMATION

(Please print or type)

Name	Last	First	Middle Initial	Badge Nickname (Preferred First Name)
Title	Company		Position/Title	
Business Address			City/State	Zip
Phone	Fax		E-mail	

Advance reading materials will be mailed one month prior to the program. Unless otherwise indicated, these materials will be sent to the address above. A street address must be provided as we cannot send to a post office box. If you want materials sent to your home address, please provide below.

Address	City	State	Zip
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EDUCATION

College or University (if applicable, but not required)	Degree Obtained
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BUSINESS EXPERIENCE

List your experience in the financial field (list most recent position first) and briefly outline your specific job responsibilities.

COMPANY INFORMATION

Length of time in current position _____	Length of time with company _____	Number of personnel in company _____
Number of your direct reports _____	Number of your total reports _____	
Total Company Assets \$ _____	Consumer Credit Outstanding \$ _____	

APPLICATION MUST BE SIGNED BY YOUR SUPERVISOR OR A DESIGNATED COMPANY OFFICIAL

Name	Title	Company	
Address	City/State	ZIP	E-mail
Signature of Supervisor/Company Official	Date	Signature of Applicant	Date

SEND COMPLETED APPLICATION AND PAYMENT TO:

AFSA Education Foundation	Phone: 202-466-8611
Attn: Susie Irvine	Fax: 202-223-0321
919 Eighteenth Street, NW, Suite 300	E-mail: mdp@afsamail.org
Washington, DC 20006-5517	Web site: www.afsaef.org

Registration is now available online. Please visit www.afsaef.org

AFSA PROFESSIONAL DEVELOPMENT COMMITTEE

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