

What a Key Banker Does

As the key banker for a bank, you are responsible for implementing PEP within the bank and coordinating its activities within the community.

The following responsibilities are not inclusive, but are intended only as a guide. As you become more involved, you undoubtedly will add to and revise your PEP responsibilities. As the key banker, you will:

- C be responsible at the bank for implementing PEP in your community by:
 - T gaining support of the CEO and the bank's top management
 - T working with others in the bank to set up a PEP program;
- promote PEP with educators and community group leaders in your area by:
 - T meeting with school officials to explain the purpose of the program and to gain their support
 - T working with teachers and school officials to establish the specifics of your PEP presentations in the classrooms
 - T working with community group leaders to establish their financial education needs and to determine how PEP can meet those needs;
- secure, train, and equip others in your bank to present various banking topics in a professional manner to all age groups and to assist in specialized areas when needed;
- seek out opportunities to present effective PEP presentations, whether in a group setting or on an individual basis;
- ensure that a PEP report card is completed and returned to the TBA office by the banker-educator and the appropriate courtesies follow each presentation;
- communicate results and data to your CEO, local news outlets, and others as appropriate;



Mail or Fax Back – Deadline July 6

2007-2008 PEP Key Banker Nomination

YES

NO

As CEO or manager. I believe my bank should be actively involved in the community. I want my bank to be a part of the TBA's Personal Economics Program (PEP) to increase financial literacy in my community and to help educate the public on the role banks play in our society.

Please nominate only one key banker per city. If you have branches in more than one city, please use a separate copy of this form for each location.



I have selected Mr _____
Mrs _____
Ms _____ Name (please print or type)

as our Key Banker to coordinate our bank's participation in PEP. In so doing, I not only submit the name shown above, but I acknowledge the time commitment PEP will require of this banker.

CEO or Manager _____

Bank _____

Address _____

City _____ State _____ Zip _____

Key Banker's Title _____

(for educational tracking purposes only)
SS# _____

E-mail _____

Bank Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____



**Please return by July 6, 2007 to:
Monique Jenkins, TBA PEP Coordinator
201 Venture Circle, Nashville, TN 37228-1603
Fax: 615/244-0995**