
DAVE WICKLUND - DIRECTOR OF ALM ADVISORY SERVICES

PLANSMITH CORPORATION (2012-Present) - Director of Educational and Advisory Services

- Responsible for all Outsourcing and Advisory Services
- Provide consulting services to financial institutions in the areas of interest rate risk (IRR) model assumption development, asset/liability management (ALM) policy guidance, cash flow modeling, contingency funding, and capital/strategic planning
- Conduct independent reviews of IRR and liquidity risk management programs
- Assist banks and credit unions in Asset/Liability Committee reporting and oversight
- Deliver ALM training to regulators, financial institution directors, and industry trade groups
- Serve as a member of Plansmith's Strategic Oversight Committee and assist in product design

FDIC (1991-2012) - SENIOR BANK EXAMINER

Examination Experience

- Served as a Capital Markets Subject Matter Expert and Asset Liability Management Specialist
- Participated on examinations of banks and thrifts with total assets between \$13 million and \$66 billion
- Served as Examiner-in-Charge of over 75 examinations and visits of community and commercial banks with total assets between \$32 million and \$3 billion, over 35 of which were problem institutions
- Drafted, implemented, and determined compliance with numerous formal and informal plans for corrective action

Training Efforts

- Co-developed and served as a lead course instructor for the FDIC Corporate University's *Asset/Liability Management School*, a required core training course for all FDIC examiners
- Served as an invited instructor at the Federal Reserve Board of Chicago's *Asset/Liability Management Lab*
- Developed nation-wide training materials and led train-the-trainer sessions for the FDIC's *Evaluating IRR Models* training course
- Authored articles released to community bankers via FDIC SCANS bulletins on *Interest Rate Risk*, *Independent Review Requirements*, and *Liquidity Risk Management*
- Developed materials and led training for the FDIC's *2008 Chicago Regional Interest Rate Risk Training*
- Instructed at the FDIC Corporate University's *Financial Institution Analysis School*
- Served as presenter for the FDIC Chicago Region's Directors College leading sessions on *Interest Rate Risk Management*, *the Uniform Bank Performance Report*, *Management Succession*, and *Corporate Governance*

EDUCATION

Graduate Degree (2002)

Graduate School of Banking at the University of Wisconsin - Madison

Bachelor of Science in Business (1991) - Cum Laude

University of Wisconsin – La Crosse

Major: Finance

Minor: Accountancy

Concentration: Money and Banking