

Technology Compliance Training

Live or On-Demand Webcast

Live Webcast • Wednesday, December 2, 2009 • 7:00 a.m. – 2:00 p.m. (Mountain)



Because IT Governance is a team effort, awareness is the most important control. GLBA Compliance touches on all four corners of the bank: from your board through your management team, IT staff, and network users to your customers. Financial institutions must maintain an appropriate training program for all levels at the bank, stressing the threats and vulnerabilities financial institutions face, and helping team members understand their role in mitigating information security risk.

Consider Sending More Than One Person!

Technology Compliance Training works best when a programmatic approach is developed through an organic, multi-disciplinary process. The best program is the one designed by a team including technology, compliance, security, and branch personnel. This workshop comes with deliverables that can be customized to your bank's needs. One of the deliverables is a PowerPoint that can be used to provide annual training. Sending several trainers to see the demonstration of this PowerPoint will help you customize this approach to the unique needs of your bank.

Agenda

- ❖ GLBA Compliance Training Regulations
- ❖ Awareness at all "Levels" of the Institution
- ❖ Alternative Approaches to Training
- ❖ Ongoing Training: Reminders and Exercises
- ❖ Tying the Audit Report to the Ongoing and Annual Training Program
- ❖ The Acceptable Use Policy (AUP)
- ❖ Creating Your Own Annual Training Workshop
- ❖ An Example Annual Training Workshop
- ❖ Due Diligence Exercises
- ❖ Programmatic Approach to Awareness

Deliverables (Templates)

- ❖ AUP Compliance Checklist
- ❖ Training Outlines
- ❖ User Awareness Training PowerPoint Presentation
- ❖ User Awareness Comprehension Test
- ❖ Access to Our Workshop Portal and Appropriate Boilerplates

About Your Presenter

Dan Hadaway CISA, CISM

Dan comes from an entrepreneurial background which gave him his first experience managing the IT governance process in 1984. Prior to founding **infotex** in 2000, he had overseen software development projects, e-commerce application development, and many network installation projects. He wrote his first Acceptable Use Policy in 1986, and conducted his first Information Technology risk assessment in 1989.

Dan focused **infotex** on the banking industry in 2003 when he oversaw the acquisition of Paradigm Shift Security. He now works extensively with banks, engaging in projects ranging from IT Audits to Awareness Training to GLBA Compliance Consulting. He tailors his consulting to any size bank, working on simple user-level policies with banks as small as one location, to providing board and management-level regulatory compliance training for Fortune 500 companies. His primary strength is the use of risk management fundamentals to help banks determine where they need to be on the compliance spectrum.

Who Should Attend

This "train the trainer" workshop is directed to information security officers, compliance personnel, training personnel and branch managers. Anyone involved in developing training programs for how users are expected to treat Information in the bank should attend this hands-on workshop.

Webcast

A webcast is a live streaming video that can be accessed from your computer. This virtual delivery method allows multiple attendees to participate from one location for one fee.

On-Demand

An On-Demand seminar is an event that has been recorded into an online streaming video that can be accessed at any time & at your own convenience. These types of seminars are accessible 24/7, and can be viewed as many times as you like within a 6-month time period.

Please check all appropriate boxes

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Seminar Content Questions: Contact Angie Olson, Idaho Bankers Association at (208) 342-8282. Please route this brochure.