

**VITA**  
**JAMES B. BEXLEY**

January 9, 2018

**GOVERNMENT SERVICE:**

Served as Virtual Fellow, United States Department of State, Office of Threat, Finance, Countermeasures, Bureau of Economic Business Affairs.

**CORPORATE DIRECTORSHIP:**

Completed six years as a director of the Eleventh Federal Reserve Bank Board of Directors. Served as the Chair of the Audit Committee and as a member of the Executive Committee for four years.

**EDUCATION:**

BBA, University of Texas, El Paso (graduated with honors)

MBA, University of Houston, Houston, Texas

JD, Blackstone School of Law, Chicago, Illinois

Ph D, University of Stirling, Stirling, Scotland

**ACADEMIC EMPLOYMENT:**

1997 to Present – Chairholder, Smith-Hutson Endowed Chair of Banking and Distinguished Professor of Finance, College of Business Administration, Sam Houston State University, Huntsville, Texas, and Texas State University System Regents’ Professor

Twenty-one years as a faculty member of the Graduate School of Banking at Southern Methodist University, Dallas, Texas.

Three years as an adjunct faculty member teaching advanced level finance courses at the University of Texas (Pan American) at Edinburg, Texas.

Four years as an adjunct faculty member teaching finance and management courses at Houston Community College, Houston, Texas. Additionally, I was selected by the faculty and students to receive the annual Outstanding Teaching Award.

**NON-ACADEMIC EMPLOYMENT:**

1993 to December 1996 – Cardinal Bancorp and First American National Bank of Pennsylvania, Everett, Pennsylvania, President & Chief Executive Officer

1991 to 1993 – Banking Consultants of America, Memphis, Tennessee, President

1988 to 1991 – United American Bank, Memphis, Tennessee, President – Chief Executive Officer

1979 to 1988 – Chase Manhattan Bancorp (acquired Texas Commerce Bancorp in 1987)

1987 to 1988 – Texas Commerce Bank Corpus Christi, Texas, Chairman – Chief Executive Officer

1980 to 1987 – Texas Commerce Bank, McAllen, Texas

1982 – 1987 – Chairman – Chief Executive Officer

1981 – 1982 – President – Chief Operating Officer

1980 – 1981 – Executive Vice President – Chief Operating Officer

1979 to 1980 – Texas Commerce Bancshares, Inc., Houston, Texas, Vice President

**AWARDS AND HONORS:**

- 2016 – Texas State University System Regent’s Professor Award.
- 2016 - Texas Bankers Association Lifetime Achievement Award
- 2015 – “Consumer Bank Preference,” by James B. Bexley and Karen Sherrill won the Academy of Business Research Best Paper Award, October 29.
- 2015 – Sam Houston State University Distinguished Professor Award.
- 2014 – Sam Houston State University Alumni Association Service Award.
- 2012 – College of Business Administration Excellence Award.
- 2010 – Sam Houston State University Outstanding Service Award for service to the University, community, and state.
- 2007 – “Banking Customers’ Varied Reactions to Service Recovery Strategies,” by JoAnn M. Duffy, John M. Miller, and James B. Bexley won the Emerald Literati Network 2007 Awards for Excellence, April 27.
- 2005 - “The Larry R. Watts Distinguished Service Award,” at the Allied Academies 2005 International Conference in Memphis, Tennessee, April 13-16.
- 2004 – “Service Quality: An Empirical Study of Expectations Versus Perceptions in the Delivery of Financial Services,” by James B. Bexley, Paul Hewer, and Leigh Sparks publication won the Distinguished Research Award in Marketing from the journal.
- 2003 – “E-Commerce in Banking,” by James B. Bexley, Balasundram Maniam, and Joe F. James won the Distinguished Research Award at the Allied Academies 2003 International Conference in Tunica, Mississippi, April 11.
- 2003 – “Commercial Banks’ Privatization and Creation of Private Banks in Uzbekistan as the Necessary Factor to Restructure the Banking System,” by Nodira S. Rakhimkhodjaeva and James B. Bexley won the Distinguished Research Award at the Allied Academies 2003 International Conference in Tunica, Mississippi, April 11.
- 2003 - Creative and Innovative Teaching Award presented by the Academy of Educational Leadership at the Allied Academies 2003 International Conference in Tunica, Mississippi, April 10-12.
- 2002 – “Mergers: Methods of Payment and Impact on Expected Market Reaction,” by Balasundram Maniam, James B. Bexley, W. Hadley Leavell, and Leslie Toombs won the Distinguished Research Award in Marketing at the Allied Academies 2002 International Conference in Las Vegas, Nevada.
- 2002 – “CEO Perception of Customer Satisfaction: An Empirical Study,” by James B. Bexley, and Balasundram Maniam won the Distinguished Research Award in Marketing at the Allied Academies 2002 International Conference in Las Vegas, Nevada.
- 2001 – “A Survey of U.S. Foreign Direct Investment Determinants in ASEAN-5 Countries,” by Balasundram Maniam, Dorothy Mehrens, and James B. Bexley won the Distinguished Research Award at the Allied Academies 2001 International Conference in Las Vegas, Nevada.
- 2000 – “Marketing Concepts for Banking in the New Millennium,” by James B. Bexley, Balasundram Maniam, and Joe F. James won the Distinguished Research Award in Marketing at the Allied Academies 2000 International Conference in Maui, Hawaii
- 2000 – “Perception of Islamic Financial System: Its Obstacles in Application, and Its Market,” by Balasundram Maniam, James B. Bexley, and Joe F. James won the Honorable Mention Award in Accounting and Finance at the Allie Academies 2000 International Conference in Maui, Hawaii.
- 1999 – First Runner-up Best Paper Award Winner – Academy of International Business, U.S. Southwest Chapter Conference.

1998 – Sam Houston State University \$5,000 Research Grant.  
 1973 – Outstanding Teaching Award – Houston Community College System.  
 1964 – Outstanding Service Award (One of three recipients including former President George Bush), Texas Mid-Continent Oil & Gas Association.  
 1963 – Silver Beaver Award, Boy Scouts of America.  
 1975 – Who's Who in the South and Southwest.  
 1978, 1979 – Who's Who in Business and Industry.  
 1979, 1980 – Who's Who in the World.  
 1983, 1984, 1985, 1986 – Who's Who in America.

### **SERVICE:**

2013 to Present – Chair, Faculty/Staff Fund Raising Drive, Sam Houston State University  
 2012 to Present – Member, University Investment Committee, Sam Houston State University  
 2011 to Present – NCAA Faculty Athletic Representative, Sam Houston State University  
 2012 – Chair, Faculty/Staff Fund Raising Drive, Sam Houston State University  
 2011 – Chair, Faculty/Staff Fund Raising Drive with 80% participation  
 2010 – Chair, Faculty/Staff Fund Raising Drive with 80% participation  
 2010 – Member, Federal Reserve Board Washington D.C. Panel Conference of General Auditors  
 2010 – Chair, Intellectual Contribution Committee, College of Business, Sam Houston State University  
 2009 – Conducted program for bankers to raise \$28,350 for operating programs  
 2009 – Member, Executive Committee, Federal Reserve Board for the Eleventh District  
 2009 – Raised additional \$7,000 for student scholarships  
 2008 to Present – Faculty Advisor, Banking & Finance Club  
 2008 – Formed Banking & Finance Club with Dr. Joe James  
 2008 – Speaker for “Let's Talk Committee” fund raiser for Honors Program  
 2008 – Raised additional \$7,500 for student scholarships  
 2007 to 2011 – Chair, Audit Committee, Federal Reserve Board for the Eleventh District  
 2007 to 2009 – Chair, Building Committee, Elkins Lake Baptist Church  
 2007 to 2009 – Member, Finance Committee, Elkins Lake Baptist Church  
 2007 to Present – Member, University “Let's Talk Committee” Honors Program fund raiser  
 2005 – Present Coordinator for Financial Tools Software Program—a gift to SHSU worth \$1.2 million to date  
 2006-2009 – Chair of the University Faculty and Staff Fund Raising Campaign  
 2006 to 2007 – Member, Audit Committee, Federal Reserve Board of the Eleventh District  
 2005 to 2011 – Member, Federal Reserve Board for the Eleventh District  
 2005-2009 – Member Executive Committee Federal Reserve Board for the Eleventh District  
 2005 to Present – Chair, Executive-in-Residence Speaker's Program for COBA  
 2005 – Recipient, Larry R. Watts Distinguished Service Award, The Allied Academies  
 2005 – Established an Executive MBA Degree Program in Banking  
 2005 – Member, Nominating Committee, Federal Reserve Board for the Eleventh District  
 2004-2008 – Chair, University Athletic Advisory Committee  
 2003 – Established Bexley Endowed Scholarship for Banking Students  
 2003 – Received Technology Award for Banking Center  
 2003 – Established Bexley Endowed Scholarship for Banking Students  
 2002 – Present Chair Banking & Finance Scholarship Award Committee  
 2002 to Present – Chair, Smith-Hutson Endowed Chair of Banking Advisory Board, College of Business Administration  
 2002 – Implemented BBA Degree in Banking and Financial Institutions  
 2000 – Developed a Minor in Banking for the Finance curriculum  
 1999-Present – Member, Dean's Advisory Board, College of Business Administration

1998-2009 – Chair Intern Program for COBA placing 746 students in 11 years  
 1998 – Established intern program for banking and finance majors.  
 1997-2009 – Coordinate Annual Seminar & Golf Tournament Fund Raiser to date have raised \$190,740 net of scholarships  
 1997 – Created banking scholarship program  
 1997 – Started annual program for bankers to raise money for operating programs  
 1997 (May-August) – Worked without pay over 650 hours to create banking program

### **SPECIAL PRESENTATIONS:**

Selected by Former Treasury Secretary/U.S. Senator Lloyd Bentsen to present professional testimony to the U.S. Senate Finance Committee. Over the last several years, I have been a speaker on banking topics for the American Bankers Association, Bank Administration Institute, Independent Bankers of America, Assemblies for Bank Directors and state bankers associations in Pennsylvania, Illinois, Texas, Tennessee, North Carolina and other local groups. Completed two Risk Management Videos for American Bankers Assn. Nationwide Skylink in 1996 for satellite training of all member bank employees and officers.

Invited to be Texas Bankers Association's Cornerstone Keynote Luncheon Speaker on May 8, 2003 at their annual convention in Austin, Texas.

### **CIVIC AND PROFESSIONAL ACTIVITIES:**

NCAA Faculty Athletic Representative, Sam Houston State University...Chair, Faculty and Staff Annual Fund Drive...Member, College of Business Administration Career Fair Committee, Sam Houston State University...Member, Advisory Board, College of Business Administration...Chairman, Advisory Board, Smith-Hutson Endowed Chair of Banking...Member, College of Business Administration Public Relations Committee, Sam Houston State University...Member, Graduate Advisory Committee, Sam Houston State University...Member, Finance Curriculum Committee, Sam Houston State University...Member, Finance Assessment Committee, Sam Houston State University...Chairman, Banking Scholarship Selection Committee, Sam Houston State University...Chairman, Athletic Advisory Committee Sam Houston State University...Chairman, Faculty and Staff Annual Fund Raising Campaign Sam Houston State University...Member, International Board of Directors, Society for Advancement of Management...Board of Directors, Consumer Credit Advisory Service of the Gulf Coast of Texas...Past Chairman, Board of Directors, Consumer Credit Advisory Service of Walker County...Past Chairman of the Advisory Board, Allegany Community College... Board Member, Bedford Economic Development Authority...Board Member, Bedford Arts Council...Board Member, Renaissance Foundation of Everett School District...Board Member, Bedford County Chamber of Commerce...Member, Governor's Talks Force to Make Pennsylvania Business Friendly... Past Member, Governor of Texas' Select Committee on Private Sector Initiatives...Former Banking Resource Person, Senator Phil Gramm...Past Member, Board of Regents, Lambuth University...Former Adjunct Professor, Graduate School of the Fogelman School of Business, Memphis University...Former Advisory Board Member, Fogelman School of Business, Memphis University...Former Member, Board of Regents and Member, Executive Committee, Midsouth School of Banking...Management Faculty Member, Graduate School of Banking, Southern Methodist University, Dallas, Texas...Past Chairman of the Board, Intermediate Banking School, Southern Methodist University, Dallas, Texas...Member of Governing Council, Pennsylvania Bankers Association...Member, Board of Directors, Member of the Education Committee, Pennsylvania

## **PROFESSIONAL PUBLICATIONS:**

### **Current Research Projects:**

2008-2011 Service Quality Delivery to Bank Customers  
2011 Impact of Economic Downturn on the Banking Industry and the General Economy  
2011 Selling Financial Products  
2011-2015 Financial Crisis Management and Consumer Banking Issues  
2016-2018 Millennials Relationships with Financial Institutions

### **Books Authored**

2018-*Selling Financial Products in Today's Environment*, by James B. Bexley (Textbook Media Press, Saint Paul, Minnesota)  
2011-*Selling Financial Products, A Practical Guide for Successful Bank Sales with Case Studies*, by James B. Bexley (Pearson Publishing, New York), In the market August 1, 2011  
1998-*Directors' Duties & Responsibilities in Financial Institutions* by James B. Bexley (Sam Houston Press, Huntsville, TX)  
1985-*The Bank Director-A Complete and Practical Handbook* by James B. Bexley (Bankers Publishing Co., Boston)  
1978-*Banking Management* by James B. Bexley (Gulf Publishing Co., Houston)  
1966-*Oil & Gas Legal Forms* by James B. Bexley (Allen Smith Co., Indianapolis)

### **Professional Journal Articles (Peer Reviewed/Rigorous Editorial Review):**

2017 – “Where to Put Your Money to Get Their Money: A Bank Advertising Awareness Study,” by James B. Bexley and Karen Sherrill published in *Business Perspectives, Banks and Bank Systems*, Vol. 12, Issue 1, pp. 152-159.  
2017 – “Banking Preferences of Millennials,” by James B. Bexley and Karen Sherrill published in the *Journal of Behavioral Studies in Business*, Vol. 9, pp. 14.  
2017 – “The First National Bank of Mount Dora, FL Case,” by James B. Bexley published in the *International Research Journal of Applied Finance*, Vol. VII, Issue 5, May, pp. 1-11.  
2016 – “Consumer Bank Preferences,” by James B. Bexley and Karen Sherrill published in the *Journal of Applied Financial Research*, Vol 1, pp. 24-41.  
2016 – “Demographic and Relational Variables and Service Quality in Banking,” by James Bexley and Irfan Ahmed, forthcoming.  
2015 – “Does the Recent Change in Bank Regulation Impact the Consumer,” by James B. Bexley and Steve A. Nenninger published in the *Journal of Economics and Economic Education Research*, Vol. 16, Special Issue, pp. 8-16.  
2015 – “The Evaluation of New Teaching Techniques: A Study of Electronic Delivery, Case Studies, and Industry Experts,” by James B. Bexley published in the *Journal of the World Universities Forum*, Vol. 8, Issue 2, pp. 1-7.  
2015 – “Do Celebrities Influence Buying Habits?” by James B. Bexley published in the *Journal of Management and Marketing Research*, Vol. 17, October, pp. 1-9.  
2015 – “De Novo Banks at the Crossroads,” by James B. Bexley published in the *Journal of Finance and Accountancy*, Vol. 20, September, pp. 31-36.  
2015 – “Factors Driving Financial Institution Mergers and Acquisitions,” by James B. Bexley published in the *Journal of Applied Financial Research*, Vol. 1, pp. 90-97.  
2014 – “Banking Trends in the Investment Portfolio,” by James B. Bexley published in the *Journal of Finance and Accountancy*, Vol. 17, October, pp. 1-6.  
2014 – “Three Stages to Bank Over Regulation,” by James B. Bexley published in the *Academy of Accounting and Financial Studies Journal*, Vol. 18, No. 3, pp. 89-96.

**Professional Journal Articles (Peer Reviewed/Rigorous Editorial Review) (con't):**

2014 – “Systematic Selling,” by James B. Bexley in the *ICBA Independent Banker*, September, pp. 47-48.

2014 – “A Marginal Cost of Capital Reality Check: Lender Rate and Restriction Specification,” by Robert Stretcher, III and James B. Bexley published in *The Journal of Business and Finance Research*, Vol. 4, Issue 2, Spring/Summer, pp. 63-69.

2013 – “The Future of De Novo Banks,” by James B. Bexley and Laura L. Sullivan published in the *Academy of Educational Leadership Journal*, Vol. 17, Special Issue, pp. 85-90.

2013 – “Customer Perceptions and Preferences of Financial Institutions,” by James B. Bexley and Steve A. Nenninger published in the *Journal of Finance and Accountancy*, Vol. 14, pp. 1-11.

2013 – “Using Case Studies to Prepare Business Students to Perform: A Practical Application,” by Robert Matthews, James B. Bexley and Laura Sullivan published in the *Business Studies Journal*, Vol. 5, No. 2, pp. 1-6.

2012 – “Financial Institutions and the Economy,” by James B. Bexley and Steve Nenninger published in the *Journal of Accounting and Finance*, Vol. 12 (1), pp. 42-47.

2012 – “The Globalization of Commercial Banking,” by James B. Bexley, Paul Bond and Bala Maniam published in the *Research in Business and Economics Journal*, Vol. 5, February, pp. 42-51.

2012 – “Key Indicators in Financial Institution Weakness,” by James B. Bexley and Jonathan Breazeale published in the *International Journal of Business, Accounting, and Finance*, Vol. 6, No. 1, Winter, pp. 43-52.

2011 – “Merchants Bank (In Organization): A Case Study,” by James B. Bexley and Bala Maniam published in the *Journal of Business Cases and Applications*, Vol. 4, pp. 143-154.

2011 – “The Financial Crisis and its Issues,” by James B. Bexley, Joe F. James and James Haberman published in the *Research in Business and Economics Journal*, Vol. 3, July, pp. 51-57.

2011 – “Lansing Stores, Inc.,” by James B. Bexley published in the *Journal of Case Research in Business and Economics*, Vol. 3, August, pp. 103-107.

2011 – “Omega Geophysical Corporation,” by Chip Matthews, Joe F. James and James B. Bexley published in the *Journal of the International Academy for Case Studies*, Vol. 17, No. 7, pp. 39-44.

2011 – “Omega Geophysical Corporation, Instructors Notes,” by Chip Matthews, Joe F. James and James B. Bexley published in the *Journal of the International Academy for Case Studies*, Vol. 17, No. 8, pp. 23-33.

2010 – “The Swipe and Spend Economy,” by Margie Tidwell, James B. Bexley and Bala Maniam published in the *Journal of Finance and Accountancy*, Vol. 4, September, pp. 1-12.

2010 – “Where Should General Motors Go From Here?” by Balasundram Maniam, James B. Bexley and Jolene Bon-Jorno McFarlane published in the *Review of Business & Finance Case Studies*, Vol. 1, No. 1, pp. 27-35.

2010 – “Texas Banking in the Economic Downturn,” by James B. Bexley published in *Business Studies Journal*, Vol. 2, Special Issue, No. 1, pp. 19-26.

2010 – “Tejas Steel Supply, Inc.,” by James B. Bexley and Joe F. James, published in *The Journal of Case Research in Business and Economics*, Vol. 2, May, pp. 1-8.

2009 – “Selling Financial Products in a Down Market,” by James B. Bexley, published in the *Sales and Marketing Management Magazine*, November 10.

2009 – “Gourmet Foods, Inc.: A Case in Commercial Lending,” by Lisa Poirot, Joe James, and James B. Bexley, published in *The Journal of Financial Case Research*, Vol. 11, No. I, pp. 71-77.

**Professional Journal Articles (Peer Reviewed/Rigorous Editorial Review) (con't):**

2009 – “What is the Right Thing to Do? The Case of Rural Banking,” by Jonathan Breazeale and Jim Bexley, published in *Journal of the International Academy for Case Studies*, Vol. 15, No. 1, pp. 131-135.

2009 – “What is the Right Thing to Do? The Case of Rural Banking,” by Jonathan Breazeale and Jim Bexley, published in *Journal of the International Academy for Case Studies Instructor's Notes*, Vol. 15, No. 2, pp. 131-135.

2007 – “Possibility if Russia Becoming a Strong Economic Power House,” by Hadley Leavell, Balasundram Maniam, and James B. Bexley, published in the *Journal of Economics and Economic Education Research*, Vol. 8, No. 3, pp. 83-99.

2007 – “An Overview of Audit Standards Affecting Community Bankers,” by Natalya V. Delcours and James B. Bexley, published in *Bank Accounting and Finance*, October-November, pp.45-46.

2007 – “Cut the Dividend or Borrow to Pay it? The Case of Parkway Properties,” by Jonathan Breazeale and James B. Bexley, published in *The Journal of Financial Case Research*, Vol. 9, No. 1, pp. 7-17.

2006 – “Banking Customers’ Varied Reactions to Service Recovery Strategies,” by JoAnn M. Duffy, John M. Miller, and James B. Bexley, published in *The International Journal of Bank Marketing*, Vol. 24, No. 2, pp. 112-132.

2006 – “An Empirical Investigation of Street Registration for Banking,” by Laura L. Sullivan, Joe James, and James Bexley, published in *The Journal of Commercial Banking and Finance*, Vol. 5, No. 2, pp. 61-67.

2005 – “Service Quality: An Empirical Study of Expectations Versus Perceptions in the Delivery of Financial Services,” by James B. Bexley, Paul Hower, and Leigh Sparks published in the *Academy of Marketing Studies Journal* and won the Distinguished Research Award in Marketing from the journal, Vol. 9, No. 2, pp. 115-126.

2005 – “Why Customers Choose Community Banks: An Empirical Study,” by James B. Bexley, published in *The Journal of Commercial Banking and Finance*, Vol. 4, No. 2, pp. 81-89.

2005 – “Branson Door Company,” by James B. Bexley with published in *Journal of Finance Case Research*, Vol. 7, No. 1, pp. 15-24.

2004 – “Commercial Banks’ Privatization and Creation of Private Banks in Uzbekistan as the Necessary Factor to Restructure the Banking System,” by Nodira S. Rakhimkhodjaeva and James B. Bexley with publication forthcoming in *The Journal of Commercial Banking and Finance*, Vol. 3, No. 1, pp. 1-9.

2004 – “The Contribution of Banks’ Annual Report Writing Quality to Investor Decision-Making,” by James B. Bexley published in the *Journal of Commercial Banking and Finance*, Vol. 3, No. 2, pp. 113-122.

2003 – “E-Commerce in Banking,” by James B. Bexley, Balasandrum Maniam, and Joe F. James published in *Journal of Strategic E-Commerce*, Vol. 1, No. 2, pp. 113-122.

2003 – “An Experiment Using ABC-Based Value Indexing for Bank Services,” by Ross Quarles, Leroy Ashorn, and James B. Bexley published in *Journal of Commercial Banking and Finance*, Vol. 2, pp. 35-44.

2003 – “CEO Perception of Customer Satisfaction: An Empirical Study,” by James B. Bexley, and Balasundram Maniam published in *The Academy of Marketing Studies Journal*, Vol. 7, No. 1, pp. 11-18, and won the Distinguished Research Award in Marketing at the Allied Academies 2002 International Conference in Las Vegas, Nevada.

2002 – “International Bank: An Asset/Liability Case Study,” by James B. Bexley, Joe F. James, and Balasandrum Maniam published in *Journal of the International Academy for Case Studies*, Vol. 8, No. 5, pp. 27-37 and (Case Notes), Vol. 8, No. 4, pp. 85-87.

**Professional Journal Articles (Peer Reviewed/Rigorous Editorial Review) (con't):**

2002 – “Is Subchapter S Viable for Community Banks?” by Charles R.B. Stowe, Keith Jenkins, and James B. Bexley accepted for publication in *The Journal of Legal, Ethical, and Regulatory Issues*, Vol. 6, No. 1, pp. 111-116.

2002 – “Street Registration and Community Bank Management,” by Joe F. James, James B. Bexley, and Bala Maniam published in *The SAM Advanced Management Journal*, Vol. 67, No. 4, pp. 58-63, Autumn.

2002 – “Does Planning Make a Bank More Effective,” by James B. Bexley, Leroy W. Ashorn, and N. Ross Quarles published in *The Journal of Commercial Banking and Finance*, Vol. 1, pp. 23-30.

2002 – “A Survey of Determinants of U.S. Foreign Direct Investment in ASEAN-5 Countries,” by Dorothy Mehrens, Balasundram Maniam, and James B. Bexley published in *Journal of Economics and Economic Education Research*, Vol. 3, Num. 1, pp. 87-101.

2001 – “Loan Pricing: A Pricing Approach Based Upon Risk,” by James B. Bexley, Leroy W. Ashorn, and Joe F. James published in *Academy of Accounting and Financial Studies Journal*, Vol. 5, Num. 2, pp. 175-180.

2001 – “Southwest Bank of Texas, N.A.: Maintaining Quality Performance with Rapid Growth,” by James B. Bexley and Balasundram Maniam published in *Journal of Finance Case Research*, Vol. 2, Num. 1, 2, pp 49-56.

2001 – “First Bank of Brazos County,” by James B. Bexley and Joe F. James published in the *Journal of the International Academy for Case Studies*, Vol. 7, Num. 2, pp 73-82.

2000 – “Seven Ways to Bolster Marketing,” by James B. Bexley and R. Dean Lewis published in *Bank Marketing Magazine* (the leading bank marketing journal in the nation), Vol. 33, No. 3, pp. 24-29.

2000 – “Marketing Concepts for Banking in the New Millennium,” by James B. Bexley, Balasundram Maniam, and Joe F. James won the Distinguished Research Award in Marketing at the Allied Academies 2000 International Conference in Maui, Hawaii and was published in the *Academy of Marketing Studies Journal*, Vol. 4, No. 1 & 2, pp 55-61.

2000 – “Perception of Islamic Financial System: Its Obstacles in Application, and Its Market,” by Balasundram Maniam, James B. Bexley, and Joe F. James won the Honorable Mention Award in Accounting and Finance at the Allied Academies 2000 International Conference in Maui, Hawaii and was published in the *Academy of Accounting and Financial Studies*, Vol. 4, No. 2, pp 22-36.

2000 – “Determinants of U.S. and Japanese Foreign Direct Investment in China: An Empirical Investigation,” written by Balasundram Maniam, Sanjay S. Mehta, and James B. Bexley published in *The Journal of Accounting and Finance Research*, Vol. 8, No. 5, Winter III, pp. 17-29.

2000 – “Adapting Financial Institution Directors’ Roles in the Management Process To Achieve A Competitive Advantage: A Challenge For 2000 and Beyond,” by James B. Bexley and JoAnn Duffy published in the *SAM Advanced Management Journal*, Vol. 65, No. 3, Summer, pp 9-12.

2000 – “The Strategic Planning Process for Community Banks,” by James B. Bexley published in *The Alliance of Independent Bankers*, Vol. XXVI, No. 3, March 2000, pp 14-16.

1999 – “Asian Financial Crisis: An Ex Post Look—The Warning Signs,” by Balasundram Maniam, Joe F. James, James B. Bexley, and Sanjay Mehta published in *The International Journal of Business Disciplines*, Vol. 9, No. 2, Winter 1999, pp 53-59.

1999 – “Enhancing Earnings and Shareholder Value,” by James B. Bexley published in *The Alliance of Independent Bankers*, Vol. XXV, No. 11, Nov./Dec. 1999, pp 18-20.

1999 – Guest Editor, *Journal of Business Strategies* (Special Issue on Banking), Vol. 16, No. 2, Fall.



**Professional Journal Articles (Peer Reviewed/Rigorous Editorial Review) (con't):**

1990 – “Sell the Bank First, Then the Products,” by James B. Bexley published in *Bank Marketing Journal*, pp. 30-32, December.

1985 – “Director Involvement in the Strategic Plan,” by James B. Bexley published in *Bank Administration*, Vol. LXI, No. 8, August.

1985 – “Evaluating Bank Performance: A Director’s Checklist,” by James B. Bexley published in *Texas Bankers Record*, Vol. 74, No. 4, April.

**Proceedings and Presentations at Professional Meetings:**

2017 – “Market Research to Carry Out Your Plan,” presented at the 21<sup>st</sup> Annual Bank Executives’ and Directors’ Seminar and Golf Tournament, Huntsville, TX, April 28.

2017 – “Succession Planning – From Two Perspectives,” presented at the 97<sup>th</sup> annual Texas Bankers Association Ag and Rural Affairs Conference, San Antonio, TX, April 12.

2017 – “Effective Strategy and Execution for Community Banks,” presented at Briggs & Veselka Client Meeting as Keynote Speaker, Houston, TX, March 23.

2016 – “Banking on the Leaders of Tomorrow,” panelist at the Banking on the Leaders of Tomorrow (BOLT) Program, Federal Reserve Bank of Dallas, Houston Branch, Houston, Texas, November 3-4.

2016 – “Future of Education and Recruitment in the Banking Industry,” panelist at the FDIC Roundtable, Dallas, Texas, October 27.

2016 – “What Really Drives Millennials,” presented at the 20<sup>th</sup> Annual Bank Executives’ and Directors’ Seminar and Golf Tournament, Huntsville, TX, April 22.

2016 – “How Mergers Are Changing Banking Landscape,” presented at the Sam Houston State University Eighth Annual General Business Conference, Huntsville, Texas, April 15.

2016 – “Banking Preferences and Millennials,” presented at the Academic and Business Research Institute International Conference, San Antonio, Texas, April 1-2.

2015 – “Consumer Bank Preference,” presented at the Academy of Business Research Fall Conference, San Antonio, Texas, October 29.

2015 – “Enhancing Your Bank’s Performance,” presented at the Independent Community Bankers of America 15<sup>th</sup> Annual Director’s Conference, Las Vegas, Nevada, October 16.

2015 – “Banking Millennials,” presented at the Bank CEO and Executives’ Educational Forum, Houston, Texas, August 13.

2015 – “There is a Future for Bricks & Mortar Branches,” presented at the 19<sup>th</sup> Annual Bank Directors’ and Executives’ Seminar & Golf Tournament, Huntsville, Texas, April 24.

2015 – “Does the Recent Change in Bank Regulation Impact the Consumer,” presented at the Sam Houston State University Seventh Annual General Business Conference, Huntsville, Texas, April 17.

2015 – “Competing with the Farm Credit System,” presented at the Texas Bankers Association Agriculture & Rural Affairs Conference, Fredericksburg, Texas, April 1.

2015 – “De Novo Banks at the Crossroads,” presented at the Academic and Business Research Institute International Conference, Savannah, Georgia, March 26-28.

2014 – “Factors Driving Financial Institution Mergers and Acquisitions,” presented at the Academy of Business Research Fall 2014 Conference, San Antonio, Texas, November 5-7.

2014 – “Making Your Community Bank More Competitive in Today’s Environment,” presented at the Independent Community Bankers of America 14<sup>th</sup> Annual Directors Conference, Scottsdale, Arizona, October 15-19.

2014 – “More Effective Selling Techniques,” presented at the Bank CEO and Executives’ Educational Forums, Dallas, Texas, August 14.

2014 – “More Effective Selling Techniques,” presented at the Bank CEO and Executives’ Educational Forums, Houston, Texas, August 12.

### **Proceedings and Presentations at Professional Meetings (con't):**

2014 – “What’s Wrong with This Picture?” presented at the 18<sup>th</sup> Annual Bank Executives’ and Directors’ Seminar and Golf Tournament, Huntsville, Texas, April 25.

2014 – “The Arlington Case,” presented at the Sam Houston State University Sixth Annual General Business Conference, Huntsville, Texas, April 11.

2014 – “Competing with the Big Boys,” presented at the Texas Bankers Association Agriculture & Rural Affairs Conference, College Station, Texas, April 9.

2014 – “Banking Trends in the Investment Portfolio,” presented at the Academic and Business Research Institute Conference, San Antonio, Texas, March 27-29.

2014 – “The Evaluation of New Teaching Techniques: A Study of Electronic Delivery, Case Studies, and Industry Experts,” presented at the World University Conference, Lisbon, Portugal, January 8-10.

2013 – “Driving Profitability in Today’s Regulatory Environment,” by James B. Bexley presented at the Bank CEO and Executives Educational Forum, San Antonio, Texas, October 31.

2013 – “Driving Profitability in Today’s Regulatory Environment,” by James B. Bexley presented at the Bank CEO and Executives Educational Forum, Dallas, Texas, October 29.

2013 – “Driving Profitability in Today’s Regulatory Environment,” by James B. Bexley presented at the Bank CEO and Executives Educational Forum, Houston, Texas, October 22.

2013 – “Positioning Your Bank for Success,” by James B. Bexley presented at Independent Community Bankers of America 13<sup>th</sup> Annual Directors Conference, New Orleans, Louisiana, October 17-20.

2013 – “Three Stages to Bank Over Regulation,” by James B. Bexley presented at Allied Academies Annual Conference, San Antonio, Texas, October 10.

2013 – “The Future of De Novo Banks,” by James B. Bexley presented at the Sam Houston State University Fifth Annual General Business Conference, Huntsville, Texas, April 19.

2013 – “Values that Drive Bank Assessment,” by James B. Bexley presented at the 17<sup>th</sup> Annual Bank Executives’ and Directors’ Seminar and Golf Tournament, Huntsville, Texas, April 26.

2013 – “Opportunity, Risk & Regulatory Implications in 2013,” by James B. Bexley presented at the Independent Bankers Association of Texas Educational Forum, Houston, Texas, January 17.

2012 – “What the Board Should Know About Selling Financial Products and Services,” by James B. Bexley presented at the Independent Community Bankers of America Annual Conference, Williamsburg, Virginia, October 18-20.

2012 – “Making the Selling Function More Effective,” by James B. Bexley presented at the 16<sup>th</sup> Annual Bank Executives’ and Directors’ Banking Conference, Huntsville, Texas, April 27.

2012 – “The Impact of Dodd-Frank on Community Banks,” by James B. Bexley presented at the Sam Houston State University Fourth Annual General Business Conference, Huntsville, Texas, April 13-14.

2012 – “Do Celebrities Make a Difference in Advertising?” by James B. Bexley presented at the Academic and Business Research Institute International Conference, San Antonio, Texas, March 22-24.

2011 – “Key Indicators in Financial Institution Weakness,” by James B. Bexley presented at the International Academy of Business and Public Administration Disciplines Conference, Honolulu, Hawaii, July 26.

2011 – “Don’t Let Dodd-Frank Paralyze Your Bank,” by James B. Bexley presented at the 15<sup>th</sup> Annual Bank Executives’ and Directors’ Banking Conference, Huntsville, Texas, April 28.

### **Proceedings and Presentations at Professional Meetings (con't):**

2011 – “Financial Institutions and the Economy,” by James B. Bexley presented at the Sam Houston State University General Business Conference, Huntsville, Texas, April 15.

2011 – “Merchants Bank (In Organization),” by James B. Bexley presented at the Academic and Business Research Institute Conference, Nashville, Tennessee, March 25.

2011 – “The Role of the U.S. in the Global Economy,” by Garrett Roberts, Bala Maniam, and James B. Bexley presented at the Academic and Business Research Institute Conference, Nashville, Tennessee, March 25.

2011 – “Federal Reserve – Audit Issues,” by James B. Bexley presented at the Federal Reserve Bank of Dallas, Dallas, Texas, February 9.

2010 – “Taking Your Bank to the Front of the Pack,” by James B. Bexley presented at the Independent Community Banker’s Association, Colorado Springs, Colorado, October 8.

2010 – “Lansing Stores, Inc.,” by James B. Bexley presented at the Academic and Business Research Institute Conference, Orlando, Florida, September 23.

2010 – “Bankers and Today’s Environment,” by James B. Bexley presented at the 14<sup>th</sup> Annual Bank Executives and Directors Seminar and Golf Tournament, The Woodlands, Texas, April 22.

2010 – “Texas Banking in the Economic Downturn,” by James B. Bexley presented at the Sam Houston State University GBA Conference, Huntsville, Texas, April 10.

2010 – “The Swipe and Spend Economy,” by Margie Tidwell, Jim Bexley, and Bala Maniam presented at the Academy of Academic Business & Research Institute Conference, Las Vegas, Nevada, March 4-6.

2010 – “The Financial Crisis & Its Issues,” by James B. Bexley, Joe James, and James Haberman presented at the Academy of Academic Business & Research Institute Conference, Las Vegas, Nevada, March 4-6.

2010 – “Planning for Success in Uncertain Times,” by James B. Bexley presented at Liberty National Bank Board Meeting, Liberty, Texas, February 23.

2010 – “A Marginal Cost of Capital Reality Check: Lender Rate & Restriction Specification,” by Robert Stretcher and James B. Bexley presented at the Academy of Economics & Finance Annual Conference in Houston, Texas, February 12.

2010 – “Introduction to Federal Reserve & Financial Crisis,” by James B. Bexley and Daron Peschel presented at the Academy of Economics & Finance Annual Conference in Houston, Texas, February 12.

2010 – “Financial Crisis,” by James B. Bexley presented at Leadership Houston Conference, Houston, Texas, February 4.

2009 – “Leadership in Troubled Times,” by James B. Bexley presented at Alvarez and Marsal Leadership Summit, Houston, Texas, October 27.

2009 – “Planning for Success in Uncertain Times,” by James B. Bexley presented at Independent Community Bankers Association Conference, San Diego, California, October 22-25.

2009 – “Strategic Planning for a DeNovo Bank,” by James B. Bexley presented at Memorial Bank, Houston, Texas, October 21.

2009 – “Banking Program at Sam Houston State University,” by James B. Bexley presented at the Banker’s Information Session, Houston, Texas, October 22.

2009 – “Tejas Steel Supply Lending Case,” by James B. Bexley and Joe F. James presented at the Academics & Business Research Institute Conference, Orlando, Florida, September 24-27.

2009 – “Future of the Economy and Business Outlook,” by James B. Bexley presented at the Greater Conroe/Lake Conroe Area Chamber of Commerce, Conroe, Texas, April 30.

2009 – “Who Took the Punchbowl?” by James B. Bexley presented at the 13<sup>th</sup> Annual Bank Officers and Directors Seminar, The Woodlands, Texas, April 23.

### **Proceedings and Presentations at Professional Meetings (con't):**

2009 – “The Economic Downturn and Its Impact on Banking,” by James B. Bexley, Jonathan Breazeale, and Mitchell Muehsam at the General Business Conference, Huntsville, Texas, April 17-18.

2009 – “Omega Geophysical Corporation,” by James B. Bexley, Robert (Chip) Matthews, and Joe James at Allied Academies International Conference, New Orleans, Louisiana, April.

2009 – “The Banking Program at Sam Houston State University,” by James B. Bexley presented at the Houston Federal Reserve Branch at the monthly Houston Area Banker’s Meeting, Houston, Texas, March 30.

2009 – “Economic Conditions and Predictions of Its Impact On Texas,” by James B. Bexley presented at the Houston Federal Reserve Branch to the University of Texas Dental School Alumni Association, Houston, Texas, January 9.

2009 – “The Economic Impact on Higher Education,” by James B. Bexley presented to The Higher Education Reform Committee, Austin, Texas, January 7.

2008 – “What A Good Director Needs to know to Evaluate Bank Performance,” by James B. Bexley presented at the Independent Community Bankers of America Directors Program, Savannah, Georgia, October 15-19.

2008 – “A Joint Venture to Promote Banking Education,” by James B. Bexley presented to Management Group at Pearson Publishing and New York Financial Institute, New York, New York, October 3.

2008 – “Components of Bank Capital,” by James B. Bexley presented at the Vanderbilt Banking School, Nashville, Tennessee, July 15-16.

2008 – “Managing Liquidity: The Acquisition and Retention of Bank Funds,” by James B. Bexley presented at the Vanderbilt Banking School, Nashville, Tennessee, July 15-16.

2008 – “The Condition of Banking in Texas,” by James B. Bexley presented at the 12<sup>th</sup> Annual Bank Executives’ and Directors Seminar, The Woodlands, Texas, April 25.

2008 – “The Economy: How Are We Doing and Where Are We Going?” by James B. Bexley presented at the Let’s Talk Dinner/Sam Houston State University, Huntsville, Texas, March 27.

2008 – “The Banking Program at Sam Houston State University,” by James B. Bexley presented at the South Central Texas Banker’s Association Conference, Schulenburg, Texas January 8.

2007 – “Current Economic Issues,” by James B. Bexley presented at the Independent Community Bankers of America, Branson, Missouri, October 18-21.

2007 – “Interns and Their Benefits to the Banks,” by James B. Bexley presented at the Federal Reserve Banking Conference, Houston, Texas, May 22.

2007 – “Regulatory Burden,” by James B. Bexley presented at the Texas Bankers Association Conference, Austin, Texas, February 27.

2006 – “The Customer of the Future,” by James B. Bexley presented at the ICBA/SHSU 6<sup>th</sup> Annual Directors Conference, Napa, California, October 18-22.

2006 – “Planning for Profits,” by James B. Bexley presented at the ICBA/SHSU 6<sup>th</sup> Annual Directors Conference, Napa, California, October 18-22.

2006 – “Taking Your Bank Board into the 21<sup>st</sup> Century,” by James B. Bexley presented at the Independent Bankers Association of Texas 32<sup>nd</sup> Annual Convention, San Antonio, Texas, October 1-2.

2006 – “Strategic Overview from the WFS Manager’s Perspective,” by James B. Bexley presented at the WFS Financial Conference, Austin, Texas, July 24.

2006 – “Components of Bank Capital,” by James B. Bexley presented at the Tennessee Bankers School, Nashville, Tennessee, July 18.

### **Proceedings and Presentations at Professional Meetings (con't):**

2006 – “Managing Liquidity: the Acquisition & Retention of Bank Funds,” by James B. Bexley presented at the Tennessee Bankers School, Nashville, Tennessee, July 18.

2006 – “Evaluation of Director Performance,” by James B. Bexley presented at the 10<sup>th</sup> Annual Bank Executives’ and Directors’ Seminar and Golf Tournament, The Woodlands, Texas, May 4.

2006 – “Ethics in Banking,” by James B. Bexley presented at the Woodforest Bank Officer Development Program, The Woodlands, Texas, May 3.

2006 – “Impact of Sarbanes-Oxley,” by James B. Bexley presented at the Woodforest Bank Officer Development Program, The Woodlands, Texas, May 3.

2006 – “Making A Case for Case Studies,” by James B. Bexley presented at the Sam Houston State University Bank Professor Program, Huntsville, Texas, March 31.

2006 – “Planning for Profit,” by James B. Bexley presented at the Amegy Bank Correspondent Bankers Conference, Houston, Texas, March 28.

2006 – “Overview of the Economy and the 11<sup>th</sup> Federal Reserve District,” by James B. Bexley presented to the Huntsville Rotary Club, Huntsville, Texas, March 15.

2006 – “America—Small Town USA!” by James B. Bexley presented at the Tyler County Chamber of Commerce 59<sup>th</sup> Annual Banquet, Woodville, Texas, January 27.

2005 – “Plain Old Good Business,” by James B. Bexley presented at the ICBA/SHSU Directors’ Symposium in Maui, Hawaii, November 3-5.

2005 – “Credit Quality in Banking-A Case Study,” by James B. Bexley presented at the ICBA/SHSU Directors’ Symposium in Maui, Hawaii, November 3-5.

2005 – “An Empirical Investigation of Street Registration for Banking,” by Laura L. Sullivan, James B. Bexley, and Joe James, presented at the Allied Academies 2005 International Conference in Las Vegas, Nevada, October 12-15.

2005 – “Enterprise National Bank: A Study in Cost Control,” by James B. Bexley presented at the Allied Academies 2005 International Conference in Las Vegas, Nevada, October 12-15.

2005 – “Why Customers Choose Community Banks: An Empirical Study,” by James B. Bexley presented at the Allied Academies 2005 International Conference in Memphis, Tennessee, April 13-16.

2005 – “Possibility of Russia Becoming a Strong Economic Power House Draft,” by Hadley Leavell, Balasundram Manium, and James B. Bexley, presented at the Allied Academies 2005 International Conference in Memphis, Tennessee, April 13-16.

2005 – “Trinity County: The Place to Be – It’s Time Has Come,” by James B. Bexley presented at Trinity County, April 5.

2004 – “Service Quality: An Empirical Study of Expectations Versus Perceptions in the Delivery of Financial Services,” by James B. Bexley, Paul Hower, and Leigh Sparks presented at the Allied Academies 2004 International Conference in Maui, Hawaii, October 13-15.

2004 – “Branson Door Company, Inc.” by James B. Bexley presented at the Financial Management Association Conference in New Orleans, Louisiana, October 8.

2004 – “Where is the Marketing Problem—It Is the Customer Stupid!” presented by James B. Bexley at the Fifth Annual SHSU/ICBA Directors’ Symposium in Banff Springs, Calgary, Canada, September 9-11.

2004 – “Energizing Your Board for Fun and Profit,” presented by James B. Bexley at the Fifth Annual SHSU/ICBA Directors’ Symposium in Banff Springs, Calgary, Canada, September 9-11.

2004 – “Dual Banking in the 21<sup>st</sup> Century,” by Joe F. James and James B. Bexley presented at the Academy of Economics and Finance’s 2004 Annual Meeting in Biloxi, Mississippi, February 12.

### **Proceedings and Presentations at Professional Meetings (con't):**

2004 – “Strategic Planning from the Examiner’s Perspective,” presented by James B. Bexley at the Annual Federal Deposit Insurance Corporation’s Regional Training Conference in New Orleans, Louisiana, May 26.

2004 – “Barnett Pipe Company,” by James B. Bexley presented at the Allied Academies 2004 International Conference in New Orleans, Louisiana and published in the International Academy for Case Studies Proceedings, April 7-10, p. 7.

2004 – “An Empirical Study of South Central U.S. Banks Profitability, Credit Quality and Loan Growth,” by Donald J. Brown, James B. Bexley, and Joe F. James, presented at the Allied Academies 2004 International Conference in New Orleans, Louisiana and published in the Academy of Commercial Banking and Finance Proceedings, April 7-10, p. 1.

2003 – “Spotlight on the Fed: A Case Study,” by Joe James, Robert Stretcher, and James B. Bexley, presented at the Academy of Business Disciplines annual meeting in Ft. Myers Beach, Florida, November 14, 2003.

2003 – “Readers Responses to Bank Annual Reports,” by Geraldine Hynes and James B. Bexley, presented at the Allied Academies 2003 International Conference in Las Vegas, Nevada, October 15-17.

2003 – “Understandability of Banks’ Annual Reports,” by Geraldine Hynes and James B. Bexley published in Proceedings for Association for Business Communication Annual Convention, pp. 1-11.

2003 – “Event Study of Pharmaceutical Companies: An Empirical Investigation” by James B. Bexley and Jason Mizibrocky, presented at the Allied Academies 2003 International Conference in Las Vegas, Nevada, October 15-17.

2003 – “This is Not Your Father’s Bank,” by James B. Bexley, presented at the Independent Community Bankers of America/Sam Houston State University Directors’ Symposium, St. Petersburg, Florida, September 25-27.

2003 – “Getting the Most Out of Your Bank,” by James B. Bexley, presented at the Independent Community Bankers of America/Sam Houston State University Directors’ Symposium, St. Petersburg, Florida, September 25-27.

2003 – “The Banking Program at Sam Houston State University,” by James B. Bexley, presented to the Texas Bankers Association in Convention, Austin, Texas, May 8-9.

2003 – “E-Commerce in Banking,” by James B. Bexley, Balasundram Maniam, and Joe F. James presented to Allied Academies International Conference, Tunica, Mississippi, April 9-12, p. 1.

2003 – “Regulatory Issues in Bank Lending,” by James B. Bexley and Leroy W. Ashorn presented to Allied Academies International Conference, Tunica, Mississippi, April 9-12, p. 1

2003 – “Overview, Coordination of, and Updates on Existing Programs Including A New But Limited Tax Break Opportunity for Educational Expenses as a Result of the Economic Growth and Tax Relief Reconciliation Act of 2001,” by Taylor S. Klett and James B. Bexley presented to Allied Academies International Conference, Tunica, Mississippi, April 9-12, pp. 39.

2003 – “Restructuring Private Banks in Uzbekistan,” by Nodira S. Rakhimkhodjaeva and James B. Bexley presented to Allied Academies International Conference, Tunica, Mississippi, April 9-12, p. 15.

2003 – “Eurosystem Economic Issues,” by Balasundram Maniam, James B. Bexley, and John Reinke presented to Allied Academies International Conference, Tunica, Mississippi, April 9-12, p. 19.

2003 – “Bank Officer’s Perception of Managerial Writing Competency,” by James B. Bexley and Geraldine E. Hynes presented to the Association for Business Communication Southwestern United States Conference, Houston, Texas, March 6.

### **Proceedings and Presentations at Professional Meetings (con't):**

2003 – “Spotlight on the Fed: A Case Study,” by Joe F. James, Robert Stretcher, and James B. Bexley presented at the Academy of Economics and Finance Conference, Savannah, Georgia, February 12-15.

2003 – “Red Circle Revisited,” by Joseph Kavanaugh, Paul Reed, and James B. Bexley presented at the American Society of Business and Behavioral Sciences Conference, Las Vegas, Nevada, February.

2002 – “CEO Perception of Customer Satisfaction: An Empirical Study,” by James B. Bexley, and Balasandrum Maniam, presented at the Allied Academies 2002 International Conference in Las Vegas, Nevada, October 2-5, pp. 7-13.

2002 – “Mergers: Methods of Payment and the Impact on Expected Market Reaction,” by Balasandrum Maniam, James Bexley, Hadley Leavell, and Leslie Toombs presented at the Allied Academies 2002 International Conference in Las Vegas, Nevada, October 2-5, p. 41.

2002 – “Is Sub Chapter S Viable for Community Banks,” by Charles Stowe, Keith Jenkins, and James B. Bexley, presented at the Allied Academies 2002 International Conference, October 2-5, in Las Vegas, Nevada.

2002 – “What a Director Needs to Know to Evaluate Bank Performance,” by James B. Bexley presented to the Independent Community Bankers of America/Smith-Hutson Endowed Chair of Banking National Directors’ Symposium, Coeur d’ Elene, Idaho, September 25-27.

2002 – “Planning to Make the Bank More Effective,” by James B. Bexley presented to the Independent Community Bankers of America/Smith-Hutson Endowed Chair of Banking National Directors’ Symposium, Coeur d’ Elene, Idaho, September 25-27.

2002 – “How Can I Be a More Effective Director for My Bank,” by James B. Bexley presented to Security Bank, Garland, Texas, May 22.

2002 – “Enhancing Shareholder Value in a Highly Competitive Environment,” by James B. Bexley presented to Security Bank, Garland, Texas, May 22.

2002 – “Risk Management for Community Banks,” by James B. Bexley presented to Security Bank, Garland, Texas, May 22.

2002 – “Director’s Role in Making the Bank More Competitive,” by James B. Bexley presented to Security Bank, Garland, Texas, May 22.

2002 – “Strategic Planning from the Director’s Perspective,” by James B. Bexley presented to Security Bank, Garland, Texas, May 22.

2002 – “Strategic Planning from the Director’s Perspective,” by James B. Bexley presented to the Missouri Independent Bankers Association, Lake Ozark, Missouri, May 8.

2002 – “Community Bank Profitability,” by James B. Bexley presented to Southwest Bank of Texas, N.A. Correspondent Bank Program, Houston, Texas, April 24.

2002 – “International Bank: An Asset/Liability Case Study,” by James B. Bexley, Joe F. James, and Balasandrum Maniam, presented to the Allied Academies International Conference, Nashville, Tennessee, April 10-14.

2002 – “Impact of the Strong Dollar on the U.S. Economy,” by Bala Maniam, James B. Bexley, and Chris deMilliano, presented to the Allied Academies International Conference and published in the Academy of Accounting and Financial Studies Proceedings, Nashville, Tennessee, April 10-13, p. 85.

2002 – “An Experiment Using ABC-Based Value Indexing for Bank Services,” by Ross Quarles, Leroy Ashorn, and James Bexley, presented to the Allied Academies International Conference and published in the Academy of Commercial Banking and Finance Proceedings, Nashville, Tennessee, April 10-13, p. 53.

2002 – “Using E-Commerce in Business and Banking,” by James B. Bexley, Balasundram Maniam, and Joe F. James presented to the Society for Advancement of Management 2002 International Business Conference, McLean, Virginia, April 5-8, pp. 43-49.

### **Proceedings and Presentations at Professional Meetings (con't):**

2002 – “Commercial Bank Management: Understanding the Elements of Profitability,” by Joe F. James, James B. Bexley, and Cannon Ray Amos presented to the Society for Advancement of Management 2002 International Business Conference, McLean, Virginia, April 5-8, pp. 481-486.

2002 – “The Euro: Will It Survive? By Balasundram Maniam, James B. Bexley, and Joe F. James presented to the Society for Advancement of Management 2002 International Business Conference, McLean, Virginia, April 5-8, pp. 498-502.

2002 – “How Can I Be a More Effective Director for My Bank?” by James B. Bexley presented to the Independent Bankers Association of Texas Community Bank Directors’ Summit, San Antonio, Texas, March 22.

2002 – “Enhancing Shareholder Value in a Highly Competitive Environment,” by James B. Bexley presented to the Independent Bankers Association of Texas Community Bank Directors’ Summit, San Antonio, Texas, March 22.

2002 – “Risk Management for Community Banks,” by James B. Bexley presented to the Independent Bankers Association of Texas Community Bank Directors’ Summit, San Antonio, Texas, March 22.

2002 – “Directors’ Role in Making the Bank More Competitive,” by James B. Bexley presented to the Independent Bankers Association of Texas Community Bank Directors’ Summit, San Antonio, Texas, March 22.

2002 – “Strategic Planning from the Director’s Perspective,” by James B. Bexley presented to the Independent Bankers Association of Texas Community Bank Directors’ Summit, San Antonio, Texas, March 22.

2002 – “Argentina and Brazil: Trade, Development, and Opportunities within MERCOSUR,” by Balasundram Maniam, James B. Bexley, and Joe F. James presented to the Academy of Economics and Finance Meeting, Pensacola, Florida, February.

2002 – “De Novo Banks: Why Have There Been So Many Start-Up Banks?” by James B. Bexley, Balasundram Maniam, and Joe F. James presented to the Annual Meeting of the Academy of Economics and Finance, Pensacola Beach, Florida, February 13-16.

2002 – “Risk Management from the Bank Manager’s Prospective,” by Balasundram Maniam, Joe F. James, and James B. Bexley presented to the Annual Meeting of the Academy of Economics and Finance, Pensacola Beach, Florida, February 13-16.

2002 – “Financial Trends in Banking: A Ratio Analysis View,” by Joe F. James, James B. Bexley, and Cannon Ray Amos presented to the Annual Meeting of the Academy of Economics and Finance, Pensacola Beach, Florida, February 13-16.

2002 – “Successful F.D.I.C. Recruiting of the College Student from a Professor’s Perspective,” presented to National Recruiters of the Federal Deposit Insurance Corporation, Dallas, Texas, January 16.

2001 – “Is Sub Chapter S Viable for Community Banks?” by Charles R. B. Stowe, Keith Jenkins, and Jim Bexley presented at the Allied Academies International Meeting, Las Vegas, Nevada, October 10-13, pp. 1-5.

2001 – “Planning to Make a Bank Financially More Effective,” by James B. Bexley, Leroy W. Ashorn, and N. Ross Quarles presented at the Allied Academies International Meeting, Las Vegas, Nevada, October 10-13, pp. 20-24.

2001 – “Trends in Commercial Bank Profitability: A Ratio Analysis View,” by Joe F. James, James B. Bexley, and Balasundram Maniam presented at the Allied Academies International Meeting, Las Vegas, Nevada, October 10-13, pp. 26-31.

2001 – “Communicating Corporate Governance: Selection and Evaluation of Bank Directors,” by James B. Bexley, Joe James, and Balasundram Maniam presented at the Allied Academies International Conference and published in the Academy of Managerial Communications Proceedings, Las Vegas, Nevada, October 10-13, pp. 2-7.



### **Proceedings and Presentations at Professional Meetings (con't):**

2001 – “A Survey of US Foreign Direct Investment Determinants in Asean-5 Countries,” by Balasundram Maniam, Dorothy Mehrens, and James B. Bexley, presented at the Allied Academies International Conference and published in the Academy of Economics and Economic Education Proceedings, Las Vegas, Nevada, October 10-13, p. 23.

2001 – “Banking on the Future: The Next Five Years,” by James B. Bexley presented to America’s Community Bankers Graduate School, Fairfield University, Fairfield, Connecticut, July 14.

2001 – “Strategic Planning for the New Banking Environment,” by James B. Bexley presented to The Texas, South Dakota, and Florida Banking Associations, Austin, Texas, April 19.

2001 – “Loan Pricing: A Pricing Approach Based on Risk,” by James B. Bexley, Leroy W. Ashorn, and Joe F. James, presented at the Allied Academies International Conference and published in the Academy of Accounting and Financial Studies Proceedings, Nashville, Tennessee, April 4-7, p. 28.

2001 – “First Bank of Brazos County,” by James B. Bexley and Joe F. James, presented at the Allied Academies International Conference and published in the International Academy for Case Studies, Nashville, Tennessee, April 4-7, p. 2.

2001 – “Southwest Bank of Texas, N.A.: Maintaining Quality Performance with Rapid Growth,” by James B. Bexley and Balasundram Maniam, presented at the Allied Academies International Conference and published in the Institute for Finance Case Research Proceedings, Nashville, Tennessee, April 4-7, p. 1.

2001 – “Strategic Planning for Community Banks,” by James B. Bexley presented to the Brazos Valley Bankers Association, Brenham, Texas, March 21.

2001 – “Corporate Governance—Selection and Evaluation of Bank Directors,” by James B. Bexley, Balasundram Maniam, and Joe F. James presented at the Society for Advancement of Management, Las Vegas, Nevada, March 20, pp. 513-518.

2001 – “Electronic Trading and Its Significance,” by Balasundram Maniam, James B. Bexley, and Joe F. James presented at the Society for Advancement of Management, Las Vegas, Nevada, March 20, pp. 519-524.

2001 – “Street Registration and Community Bank Management,” by Joe F. James, James B. Bexley, and Balasundram Maniam presented at the Society for Advancement of Management, Las Vegas, Nevada, March 20, pp. 509-512.

2001 – “High Touch in the New Technical Environment,” by James B. Bexley presented at The Independent Community Bankers of America, Las Vegas, Nevada, March 6.

2000 – “A Study of Service Recovery Efforts in Banks,” by JoAnn Duffy, James B. Bexley, and John Miller presented at the World Scientific and Engineering Society International Conference on Mathematics and Computers in Business and Economics, Montego Bay, Jamaica, December 22.

2000 – “Customer Reactions to Banking Service Recovery Efforts,” by JoAnn M. Duffy, James B. Bexley, and John Miller in Decision Sciences Institute 2000 Proceedings, Orlando, Florida, Vol. 3, pp 1293-1295, November 18-21.

2000 – “Strategic Planning for Community Banks,” by James B. Bexley presented at The West Virginia Bankers Association Meeting, Spottswood, West Virginia, November 2.

2000 – “Enhancing Shareholder Value in the New Competitive Environment,” by James B. Bexley presented at The West Virginia Bankers Association Meeting, Spottswood, West Virginia, November 2.

2000 – “Marketing Concepts for Banking in the New Millennium,” by James B. Bexley, Joe F. James, and Balasundram Maniam, presented at the Allied Academies International Conference and published in the Academy of Marketing Studies Proceedings, Maui, Hawaii, October 11-14, p. 6.

### **Proceedings and Presentations at Professional Meetings (con't):**

2000 – “Perception of Islamic Financial System: Its Obstacles in Application, and Its Market,” by James B. Bexley, Balasundram Maniam, and Joe F. James, presented at the Allied Academies International Conference and published in the Academy of Accounting and Financial Studies Proceedings, Maui, Hawaii, October 11-14, p. 1.

2000 – “Bank Marketing for a Highly Competitive Environment,” by R. Dean Lewis and James B. Bexley presented to the Independent Community Bankers of America/Smith-Hutson Endowed Chair of Banking National Directors’ Symposium, The Woodlands, Texas, September 8-10.

2000 – “Selection and Evaluation of Bank Directors,” by James B. Bexley presented to the Independent Community Bankers of America/Smith-Hutson Endowed Chair of Banking National Directors’ Symposium, The Woodlands, Texas, September 8-10.

2000 – “Strategic Planning in a Highly Competitive Environment,” by James B. Bexley presented to the Independent Community Bankers of America/Smith-Hutson Endowed Chair of Banking National Directors’ Symposium, The Woodlands, Texas, September 8-10.

2000 – “Directors’ Duties & Conduct of the Board Meeting,” by James B. Bexley presented to the Independent Community Bankers of America/Smith-Hutson Endowed Chair of Banking National Directors’ Symposium, The Woodlands, Texas, September 8-10.

2000 – “Strategic Planning for New Banking Environment,” by James B. Bexley presented to the Texas, Oklahoma, Arkansas, and Louisiana Bankers Conference, Dallas, Texas, April 28.

2000 – “The Challenge of Service Quality in Banking,” by James B. Bexley, R. Dean Lewis, and Joe F. James presented and in the proceedings of the Decision Sciences Institute Southwest Region Annual Conference, San Antonio, Texas, March 15-18, pp. 179-181.

2000 – “Asian Stock Markets: History, Market Structure, and Regulations,” by Balasundram Maniam, James B. Bexley, and Sanjay Mehta presented at the Western Allied Social Science Association Conference, Western Allied Social Science, pp. 74.

2000 – “Credit Risk Management in a Changing Environment,” by Joe F. James, James B. Bexley, and Balasundram Maniam presented and in the proceedings of the Academy of International Business of the Southwestern Federation of Administrative Disciplines, San Antonio, Texas, March 15-18, pp.125-127.

2000 – “Strategies to Compete in the New Banking Environment,” by James B. Bexley presented to the National Convention/Annual Meeting of the Independent Community Bankers of America, San Antonio, Texas, March 5-7.

1999 – “Effective Marketing Techniques for Management and Directors,” by James B. Bexley presented to the Third Annual Bank Executives and Directors Seminar, Conroe, Texas, August 6.

1999 – “Adapting Financial Institution Directors’ Roles in the Strategic Management Process To Achieve Sustainable Competitive Advantage: A Challenge For the Year 2000 and Beyond,” by James B. Bexley and JoAnn Duffy at the Society for Advancement of Management, Las Vegas, Nevada, March 27-29. (This paper was revised and published in the Society for Advancement of Management’s *Advanced Management Journal*, Summer, 2000.)

1999 – “Customer Perceptions in the Selection of Community Banks,” by James B. Bexley presented and in the proceedings of the Academy of International Business of the Southwestern Federation of Administrative Disciplines, Houston, Texas, March 10-13. (This paper was chosen First Runner-Up Best Paper.)

1999 – “Risk Management in Pricing A Financial Product,” by James B. Bexley and Joe F. James presented in the proceedings of the Academy of International Business of the Southwestern Federation of Administrative Disciplines, Houston, Texas, March 10-13.

### **Proceedings and Presentations at Professional Meetings (con't):**

1999 – “Customer Perceptions in Bank Selection Revisited,” by James B. Bexley presented to the Independent Bankers Association of America, San Francisco, California, March 16.

1998 – “So Customers Do Prefer to Do Business with Community Banks?” by James B. Bexley presented to State Convention of the Independent Bankers Association of Texas, San Antonio, Texas, September 26.

1998 – “Directors’ Seminar – an all day seminar presented to directors and chief executive officers of the Community Bankers Association of Illinois at three locations (Mt. Vernon, IL; Springfield, IL; and Chicago, IL to 500 attendees).

1998 – “Risk Management—The New Regulator Approach,” by James B. Bexley presented to the Independent Bankers Association of America, Las Vegas, Nevada, March 11.

1997 – “Director’s Role in Marketing Bank Services,” by James B. Bexley presented to the Pennsylvania Bankers Association in Convention, Lake Buena Vista, Florida, May 17-20.

1997 – “Enhancing Earnings and Shareholder Value to Retain Ownership of the Bank,” by James B. Bexley presented to the Great Bank Director Get-Together of the Independent Bankers Association of America’s Annual Convention in Phoenix, Arizona, May 19.

1996 – “Enhancing Earnings and shareholder Value to Retain Ownership,” by James B. Bexley in a lecture and paper for both the Independent Bankers Association of America and The Assemblies for Bank Directors at Southern Methodist University at the Greenbriar Resort, West Virginia, May 5.

1993 – “Risk Management presented nationwide (Two 20-minute videos produced by the American Bankers Association for their national training program—American Skylink).

1992 – “The Role of the Community Bank Director in Today’s Changing Environment,” by James B. Bexley, presented at Virginia Community Bankers Association, Wintergreen Resort, Virginia, October 29.

1992 – “Thinking Strategically and Acting Opportunistically: Organizing Board Activities for Strategic Planning,” by James B. Bexley, presented at Virginia Community Bankers Association, Wintergreen Resort, Virginia, October 30.

1991 – “How the Director Can Help the Community Bank Grow,” by James B. Bexley presented to the Independent Bankers Association of America Directors Conference, The Mirage Hotel, Las Vegas, Nevada, April 7.

1991 – “The Director’s Role in a Community Bank,” by James B. Bexley presented to the Arkansas Bankers Association Directors Conference, The Camelot Hotel, Little Rock, Arkansas, February 20.

1990 – “Thinking Strategically and Acting Opportunistically: Organizing Board Activities to Make Things Happen,” by James B. Bexley presented to the Assembly for Bank Directors, Broadmoor Hotel, Colorado Springs, Colorado, September 1.

1990 – “Selling the Banks Products Effectively” (or How to Get the Jump on the Competition), by James B. Bexley presented to the Tennessee Bankers Association in Convention, Nashville, Tennessee, April 24.

1982 – “The Director’s Role In Marketing Bank Services,” by James B. Bexley presented to the 48<sup>th</sup> Assembly for Bank Directors at Palm Springs, California, January 31.