



GFOA-MO Fall Seminar 2026

Event Information:

Courtyard Marriott	No Prerequisites required	To register for this conference, go to
3301 Lemone Industrial Blvd.	Delivery Method - Group Live	https://www.gfoa-mo.org/ Cost is
Columbia, MO	Advance Preparation - None	\$125 Members & \$150 non-members
Rate \$119 - Room Code - HUO	Program Level - Intermediate	

Thursday November 5, 2026

3:30 pm - 4:30 pm - MU Research Reactor (MURR) Tour

Where - Mu Research Reactor, 1513 Research Park Dr, Columbia, MO 65203
The University of Missouri Research Reactor (MURR®) operates at 10 megawatts and is the highest-power university research reactor in the United States, and its reliability makes it an essential resource for researchers, scientists, engineers, students and industry partners.

Travel to and from the events will be provided from the Courtyard by Marriott Columbia.

To take part in the MURR Tour, you must RSVP on or before October 20, 2026.

5:00 pm - 7:00 pm - Arcade District Tour

Where - 602 Fay St, Columbia, MO 65201
The Arcade District is a thriving innovation hub dedicated to fostering collaboration and innovation. Situated in a walkable area, this carefully curated mix of businesses and art creates an inspiring backdrop, ideal for entrepreneurial endeavors.

This tour is limited to 25 people, and RSVP's will be confirmed on a first come basis.

RSVP at www.gfoa-mo.org.

Friday November 6, 2026

8:00 am - 8:50 am - Registration & Continental Breakfast

TBD

8:50 am - 10:20 am - Don't Box Yourself In: Rethinking Banking RFPs for What's Next - 1.5 CPE

Topic Descriptions - Don't write an RFP to buy what you already know. Write an RFP to solve a problem and invite the market to teach you what's possible. Join Commerce Bank's AVP Treasury Management Officer Michele Curry as she discusses how the public sector can rewrite how they are asking for modernized, technology-enabled outcomes rather than simply replacing existing processes.

Speakers: Michele Curry, AVP, Treasury Management Officer
Central Region, Commerce Bank

Prerequisites - None
Program Knowledge Level - Basic
Advance Preparation - None

For more information regarding refunds, concerns and program cancellation policies, please contact our offices at 816-316-4840. This conference is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org



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Event Information Continued:

Courtyard Marriott 3301
Lemone Industrial Blvd.
Columbia, MO
Rate \$119 - Room Code - HUO

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Friday November 6, 2026

10:30 am - 12:00 pm - Replace "Meetings" with "Thinkings" - 1.5 CPE

Topic Descriptions: Practical tools to run fast and engaging meetings that yield meaningful results. In this session you will learn how to guide a group to focus its attention, define outcomes, manage contributions, and avoid the most common cognitive biases.

Speaker: Phil Shearrer,
Insight Architect,
R3DESIGNgroup.com

Prerequisites - None
Program Knowledge Level - Basic
Advance Preparation - None

12:00 pm - 1:00 pm - Lunch Provided

TBD

1:00 pm - 2:40pm - Conversational AI: The new typing? - 1.5 CPE

Topic Descriptions: - We'll explore the core concepts of Conversational AI, building the foundational mental models you need to not only interact with today's tools, but adapt as the technology continues to change. Then, we'll dive into a set of interactive exercises so you leave the session with practical takeaways you can put to use immediately.

Speakers: Bryce Murray, PhD,
Founder, B43

Prerequisites - None
Program Knowledge Level - Basic
Advance Preparation - None

3 pm - 4:40 pm - Building a Portfolio for All Seasons - 1.5 CPE

Topic Descriptions - In times of market volatility and evolving Fed policy, it can be easy to fall into a habit of trying to time the market and lose sight of what is actually best for your portfolio. This session will discuss portfolio fundamentals and the current rate environment to give attendees key takeaways for how to build their portfolio.

Speaker: Rachel Woods,
Managing Director of
Institutional Strategies and
Analytics, Bank of Oklahoma
(BOK)

Prerequisites - None
Program Knowledge Level - Basic
Advance Preparation - None

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Biographies:

Friday November 6, 2026

8:50 am - 10:20 am - Don't Box Yourself In: Rethinking Banking RFPs for What's Next - 1.5 CPE

Speakers: Michele Curry, AVP, Treasury Management Officer Central Region, Commerce Bank

Field of Study: Finance

Michele earned her bachelor's degree in finance and banking from the University of Missouri in 2011 and has worked at Commerce Bank ever since. She has been a representative in the Treasury Services department since July 2013. As a Treasury Management Officer, she facilitates conversations around payments and cash-management strategies, leveraging electronic banking and automation solutions for business and commercial clients.

10:30 am - 12:00 pm - Replace "Meetings" with "Thinkings" - 1.5 CPE

Speakers: Phil Shearrer, Insight Architect, R3DESIGNgroup.com

Field of Study: Personal Development

Phil is an Insight Architect who has consulted for hundreds of organizations including Johns Hopkins, 3M, and the Central Intelligence Agency. He is a Master Trainer and Facilitator, with certifications in dozens of courses including Clifton Strengthsfinders, De Bono Thinking Tools, DISC Workstyles, Habit Story, and MOVES. He holds a Law degree and a Bachelor's degree in Education from the University of Missouri, Columbia. He is also a graduate of the U.S. Army Officer and Airborne Schools, and served as an Infantry Captain with the 9th Motorized Infantry Division.

1:00 pm - 2:40pm - Conversational AI - the new typing? - 1.5 CPE

Speakers: Bryce Murray, PhD

Field of Study: Information Technology

Bryce is an AI practitioner and entrepreneur focused on helping people and organizations turn AI from an interesting technology into something they can actually use. He holds a doctorate in AI and machine learning and has worked across research, product development, and applied AI. Today, his work at B43 focuses on practical AI adoption to help teams identify where AI can create real value, build useful workflows, and develop the skills needed to use it effectively. His approach focuses on a simpler question, "How can we make AI genuinely useful for the people doing the work?"

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Biographies Continued:

3 pm - 4:40 pm - Building a Portfolio for All Seasons - 1.5 CPE

Speakers: Rachel Woods, Managing Director of Institutional Strategies and Analytics, Bank of Oklahoma (BOK)

Field of Study: Economics (Investments)

As Managing Director of Institutional Strategies and Analytics, Rachel leads a dynamic team of strategists, providing insights and innovative solutions to BOKF's institutional clients, enhancing their financial performance and strategic positioning. Throughout her career, Rachel has been actively involved with depository institutions, specializing in fixed income portfolio strategies, analytics, asset liability management, and the application of best practices in interest rate risk modeling. Rachel is dedicated to helping customers better understand their bond portfolio and how it fits into their larger goals and objectives.

Prior to joining BOK Financial, Rachel was a Director of Depository Strategies at Truist Securities, focusing on the development and implementation of balance sheet and investment portfolio strategies for institutional customers. Rachel also spent the first eight years of her career in the Asset/Liability Management group at SunTrust Robinson Humphrey. In that role, Rachel was responsible for developing client reports, which included running ALM models, completing scenario analysis, conducting ALCO and board presentations, producing relevant ALM research, and assisting with other fixed income initiatives. Rachel also has relevant experience speaking and teaching including presenting at Truist's depository conferences, STRH Bond and ALM schools, and teaching the first year ALM class for the GBA's Georgia Banking School (2014-2019). Additionally, Rachel regularly engages in speaking opportunities with state banking associations, America's Credit Unions, and GIOA.

Rachel earned her BA in Business Administration at Rhodes College. She also holds the Chartered Financial Analyst (CFA) designation and holds the following licenses: Series 7 (General Securities Representative), Securities Industry Essentials Examination (SIE), Series 63 (Uniform Securities Agent State Law), and Series 24 (General Securities Principal).

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