

2025 BANK SECURITY RISK MANAGEMENT WORKSHOP



BANK SECURITY 2.0

THE NEXT GENERATION
OF BANK SECURITY
CHANGES EVERYTHING.

Wednesday, November 5, 2025

Registration: 9:00 a.m.
Conference: 9:30 a.m. – 4:00 p.m.

SpringHill Suites

Columbia Downtown/The Vista

511 Lady Street • Columbia, SC 29201

OUR SPEAKER:



Terry L. Choate, Jr.
Co-Founder/CEO/President
Blue-U, Boston

TOPICS:

- The New Robbery Training Experience
- Active Shooter Vs Armed Robbery
- Recognizing Signs of Violence/De-Escalation
- How Enhancing Customer Service Enhances Security

Each Attendee Will Receive a Certificate of Security Management Training.

6.6 CPE Credit Available • Please register before October 29, 2025

2025 BANK SECURITY RISK MANAGEMENT WORKSHOP

Wednesday, November 5, 2025 • 9:00 a.m. – 4:00 p.m.

This full day program, facilitated by Blue-U will include segments on robbery, active shooter, customer service, security measures and more! It includes practical, highly effective tactics and techniques and materials that you can take back to your institutions.

TOPICS INCLUDE: _____

THE NEW ROBBERY TRAINING EXPERIENCE: The New Robbery Training Experience is a unique, impactful, and extremely effective course that focuses not only on the traditional things normally covered in robbery training, but from a highly unique and far more effective perspective, but numerous non-traditional aspects that are even more critical to true safety, security, and performance than anything that is address in a typical robbery course. We will also discuss the importance of recognizing signs of violence and de-escalation. Many times, people will assume they are automatically good at these but a simple phrase like “calm down” could significantly escalate the situation.

ACTIVE SHOOTER VS. ARMED ROBBERY: This course is designed to provide practical tips on how to survive an incident of violence. Often times, our employees only receive training in armed robbery. However, occasionally employees will receive an active shooter training but rarely, if ever, are the two talked about simultaneously. The result, our employees can differentiate between the two and may choose the wrong response during a critical incident.

RECOGNIZING SIGNS OF VIOLENCE/DE-ESCALATION: In this segment, we will discuss practical ways of dealing with upset and threatening persons. Blue-U Defense will often times have a client ask us to conduct de-escalation training and our answer is always the same, yes, but only if we can teach recognizing signs of violence first. Afterall, if we can recognize the violence prior to needing to de-escalate, isn't that the better option? During this segment we will discuss body language, conscious actions vs sub-conscious actions, verbiage, spacing, and provide practical and effective methods for de-escalation. In the end with this training our goal is to “shorten the physiological gap while simultaneously widening the physical gap.”

HOW ENHANCING CUSTOMER SERVICE ENHANCES SECURITY: Often times it is explained to us that the reason security is relaxed is because they want to have an open, warm, inviting environment for customers. It is generally believed that customer service and security conflict with each other. However, we have a way to marry the two and not only significantly increase both but, set your bank apart from the competition and give you a marketing advantage!

WHO SHOULD ATTEND? _____

This informative session is directed to security officers, risk management professionals, internal auditors, compliance officers, branch managers, and anyone who needs to understand the security function!

ABOUT THE SPEAKER:



TERRY L. CHOATE, JR. CO-FOUNDER/CEO/PRESIDENT, BLUE-U, BOSTON

Terry has all of the training and experience that is normally associated with the expertise and ability to consult on acts-of-violence and safety and security. He was a law enforcement officer and SWAT Team Commander for 15 years and has all of the associated training and experiences that come with this profession. What he tells people however is that training and experience in law enforcement and/or the military does not automatically equal qualification to successfully consult businesses and schools in violence prevention and survival. In fact, it can, and sometimes does, create for more danger than doing nothing at all.

He was also a Homeland Protection Professional; has high levels of executive protection education and training; stalking and dangerous human behavior; recognizing signs of violence and de-escalation; tactics; FBI Crisis Negotiator School; and on-and-on.

Terry also has a 20-year executive-level corporate career behind him that he voluntarily ended prior to becoming a law enforcement professional. As a result, he has extensive experience in business, sales and marketing, high-end customer service that sets companies apart from their competitors. Why is this critical? Because keeping organizations secure is impacted by far more than just technology, training people, and tactics and physically keeping people safe. It's as much about reputation, impact on policy and procedure, exposure to liability, insurance and more.

Of greatest importance? This has been his life! It started when he was a young teenager when he became interested in criminals – how they become criminals, why they become criminals, how they choose victims, and most importantly – questioning the solutions that we are given every day, nationwide, to preventing and surviving incidents of violence and whether or not they actually work, or are little more than things that look great on paper but will not work if, and when, reality strikes. What he found? The majority of the things that we are presented as solutions are little more than things that look great on paper, but will not work when reality strikes. He set out to fix this; and made it his life's work.

AGENDA

- 9:00 a.m..... Registration / Coffee & Pastries
- 9:30 a.m..... Business Session
- Noon..... Luncheon
- 1:00 p.m..... Business Session
- 4:00 p.m..... Adjourn

COST

South Carolina Bankers Association members: \$445

Non-members: \$995

PLEASE REGISTER BEFORE OCTOBER 29, 2025

Due to necessary commitments and expenses, there will be no refunds of registration fees after noon on November 3, 2025.

SUBSTITUTIONS CAN BE MADE.

If you have questions, please call the SCBA at 803.779.0850

Please register the following person(s) for the **2025 BANK SECURITY RISK MANAGEMENT WORKSHOP** on Wednesday, November 5, 2025 at the SpringHill Suites Columbia Downtown/The Vista, 511 Lady Street, Columbia, South Carolina 29201.

Registration fees: \$445 for members / \$995 for non-members

Total number of registrants:

**PLEASE REGISTER BEFORE
OCTOBER 29, 2025.**

**Call 803.779.0850 or visit
www.scbankers.org.**

For additional questions
please contact Anne Gillespie
at agillespie@scbankers.org.

NAME AND NICKNAME _____

ADDRESS, CITY, STATE, ZIP _____

PHONE & EMAIL ADDRESS _____

BANK OR FIRM _____

NAME AND NICKNAME _____

ADDRESS, CITY, STATE, ZIP _____

PHONE & EMAIL ADDRESS _____

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ADDRESS, CITY, STATE, ZIP _____

PHONE & EMAIL ADDRESS _____

BANK OR FIRM _____

METHOD OF PAYMENT

☐ CHECK—PLEASE MAKE PAYABLE TO SCBA ☐ VISA ☐ MASTERCARD ☐ DISCOVER ☐ AMERICAN EXPRESS

CREDIT CARD # _____ EXP. DATE _____ V-CODE (LAST 3 DIGITS) _____

SIGNATURE _____ DATE _____ BILLING ZIP CODE _____

There will be no refunds of registration fees after noon on November 3, 2025

NOTE: Images captured at this event may be used to market next year's event, in the SCBA's Palmetto Banker magazine and/or on social media. I consent to the use of images that may contain my likeness for promotional purposes.

HOW TO REGISTER

MAIL TO:

SCBA
P.O. Box 1483
Columbia, SC 29202-1483

FAX TO:

SCBA
803.779.0890

INTERNET:

www.scbankers.org
go to "Education
and Events"



**South Carolina
Bankers Association**

P.O. Box 1483
Columbia, S.C. 29202-1483
Phone: 803.779.0850
Fax: 803.779.0890

***If you have a disability that may affect your participation in this event, please attach a statement regarding those needs. We will be happy to contact you to discuss accommodations.*