

2018 Iowa Trust Association Annual Conference

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September 26-28, 2018 | West Des Moines Marriott

Elevate your expertise you need to remain a leader in the trust profession and achieve more in the future. With changing regulations, an unsure economy, different products and services in the trust department you must employ new strategies to keep current. To help, the Iowa Trust Association invites you to attend the 2018 Annual Conference. Held over two days, the event offers up-to-date information from industry experts. This year, more vendors will join us sharing products and services for the trust industry. The annual event is a great opportunity to stay current with industry events and network with your peers from across the state. With nationally-known speakers and relevant topics, this is an event you cannot miss. Use the attached form to register today!

Location

West Des Moines Marriott

1250 Jordan Creek Parkway, West Des Moines
Ph. 515-267-1500 Rate: \$129.00

A block of rooms has been reserved at the West Des Moines Marriott. Reserve your rooms with the hotel directly. Request the ITA room block for conference rates. After September 5, rooms are available on space available basis only.

Conference Website

Additional information and a complete list of conference exhibitors and sponsors is available on the ITA website at www.iatrust.com under the Events Tab.

Questions

Call the Iowa Trust Association at 800-987-7365 with any questions.

Continuing Education Hours

CLE, CTFA, CRSP, and CFP hours applied for.

Conference Sponsors

Broadridge Financial Solutions, Inc.

BTC Capital Management

EPIC Advisors

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Northern Trust Asset Management

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Registration

Conference registration includes all general and concurrent sessions, lunch, breaks and Thursday evening's reception and Friday's breakfast.

	Advance	At Door
Members	\$250	\$275
Nonmember	\$350	\$375

Send form with payment to:
Attn: Registrar, Iowa Trust Association
PO Box 6200
Johnston, IA 50131
Fax: 515-280-4140

Company _____

Address _____

City, State, Zip _____

Phone _____

Name _____

E-Mail _____

Name _____

E-Mail _____

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Wednesday, September 26

12:00 p.m. ITA Peer Group Meetings

Join your peers prior to the conference for an afternoon of discussion on ideas that pertain to you! Conference registration is not required for this event and it is open to anyone who would like to attend. Please contact ITA's Darcy Burnett at dburnett@iowabankers.com for more information.

12:00 p.m. Lunch & Welcome

12:30 p.m. The Mentally Strong Leader: Strategies for Facing Uncertainty with Quiet Confidence

Brenda Clark-Hamilton, Fresh Coffee Professional Growth, Algona

In many of our ever-changing industries, today's leaders are being asked to demonstrate steady fortitude in uncertain and volatile times. This engaging session focuses on how leaders can become consistently mentally strong in order to face these challenges with a quiet confidence that says, "I can face whatever is thrown my way." Using compelling research and real-life examples, Brenda will provide participants with practical, take-home strategies for remaining positive, level-headed, and assured, i.e., truly the type of leader up to the task of leading their people through whatever the future holds.

1:30 p.m. Group Discussion

Thursday, September 27

8:30 a.m. Registration & Exhibits Open

9:00 a.m. Welcome

Jon Holthe, CBI Bank & Trust, Muscatine

9:05 a.m. What Happens Next?

Mark Zinder, Economic Forecaster

We live in increasingly uncertain times; rapid economic changes, global unrest, and bi-partisan bickering have all lead to an underlying sense of uncertainty. In addition to the current climate, headlines are screaming that robots and artificial intelligence are going to eliminate worker's jobs. What if they are all wrong? What if we are merely extrapolating the present and ignoring the possibilities of the future? History books are full of examples of previous revolutions that came and went: the industrial revolution, the railroad revolution, electrification, mass production, and now, quite possibly, the information technology revolution. In this presentation, you will discover how we are nearing the end of this revolution while another is just beginning, providing a fresh wave of prosperity. Now is the time to ask yourself, "What Happens Next"?

10:20 a.m. Break with Exhibitors

10:40 a.m. Economic Outlook for 2019 and Beyond

Jim McDonald, Northern Trust

Mr. McDonald is the Chief Investment Strategist & Executive Vice President for Northern Trust. He chairs the Northern Trust Tactical Asset Allocation Committee, is a member of the Investment Policy and Private Equity Investment Committees, and is trustee of the Northern Trust Alpha Strategies and Equity Long/Short Strategies Hedge Funds. He is a frequent speaker at conferences and is frequently featured on CNBC and Bloomberg.

Noon Lunch

Sponsored by BTC Capital Management

1:00 p.m. Breakout Sessions

1. Unique Asset Management: Three Steps to Success

Dick Jacobs, PDS

Trust organizations may be surprised to learn that among the affluent, half (but only half) of their net worth consists of stocks, bonds, mutual funds and other investments originating on Wall Street. The other half is real estate, interests in privately-owned businesses, life insurance, artwork, mineral interests and other "unique assets". Unique assets are as important as their owners (if not more important) as their traditional investments, yet when challenges arise and their owners seek a knight in shining armor, advisors tend to look the other way. That's a shame because providing solutions is so easy.

2. Advising Your Clients and Protecting Yourself Against Cyber Threats"

John Lande, Dickinson Law Firm, Des Moines

This presentation focuses on the most current cyber threats against individuals and businesses. From account hijacking to database hacking to the crypto locker ransom scheme, John educates the audience by providing real examples, the vulnerability that allowed the crime to occur and what you can do to prevent it from happening to you and how to safeguard clients.

3. The Future of Land Ownership: Land Value Trends and Sustainability as a New Arbitrage

Dave Muth, Peoples Company, Clive

Consumers are demanding new performance standards from our agricultural production systems which creates opportunities and potential challenges for land owners. This session will discuss trends in land value, pressures influencing those trends going forward, and the opportunities for active land management strategies to improve the financial position of land assets.

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2:00 p.m. **Break with Exhibitors**

2:20 p.m. **Breakouts Repeat**

3:20 p.m. **Break with Exhibitors**

3:35 p.m. **Structuring and Drafting Trusts and Administration to Minimize Fiduciary Risk**

Robert Hodges, BrownWinick Law Firm, Des Moines

This presentation will evaluate options for reducing trustee liability through the lifecycle of trust administration, addressing selection of governing law, choice of trustee and division of duties among fiduciaries. Issues surrounding due diligence both at the trust acceptance phase and during ongoing administration will be addressed.

4:35 p.m. **Reception with Exhibitors**

Sponsored by Broadridge Financial Solutions

Friday, September 28

8:00 a.m. **Full Breakfast Buffet & Annual Meeting**

Sponsored by Northern Trust Asset Management

8:45 a.m. **Regulatory Update**

Phoebe Papageorgiou, ABA, Washington, D.C.

Learn more about what's new on the national trust scene with proposed and pending legislation, new regulations and current issues that will affect you as a trust professional. Review recent developments coming from Congress and the regulatory agencies and assess their impact on the wealth management, charitable and employee benefit business lines.

9:45 a.m. **Break**

10:00 a.m. **The Sincerity in Service**

Paul Long, Fundamism, Kansas City

What is a world-class customer experience? Are you certain that your definition will differentiate you from your competitors? In this 60-minute keynote or breakout session, Paul Long discusses the impact created when the customer has no doubt that your staff is genuine in their desire to help. Through Paul's concept of Fundamism, your team will learn principles that aid in listening and connecting with others while stressing the importance of sincerity in every interaction. You'll also hear the story of how these same Fundamism principles have helped countless families through difficult times while raising awareness and money for pediatric cancer research. "The Sincerity in Service" is designed to enhance your employee's customer interactions while revealing additional opportunity to make a difference in all walks of life.

11:15 a.m. **Adjourn**

Featured Speakers



Mark Zinder is a seasoned financial professional and keynote speaker with a unique gift for making the complicated clear as he examines the trends and ideas actively shaping business today. Mark's distinctive and captivating style has made him one of the busiest and most requested speakers in the fields of finance, economics and business development.

Mark came to the financial industry 34 years ago and gained immediate recognition for his engaging seminars and market intuition. He honed his talents as National Spokesman for Franklin Templeton, where he spent over six years consulting with Sir John Templeton, Dr. Mark Mobius, Mr. Michael Price, and other renowned economists and money managers.



Jim McDonald is an Executive Vice President and the Chief Investment Strategist for Northern Trust. In addition, he chairs the Northern Trust Tactical Asset Allocation Committee, is a member of the Investment Policy and Private Equity Investment Committees, and is trustee of the Northern Trust Alpha Strategies and Equity Long/Short Strategies Hedge Funds. Prior

to joining Northern Trust in 2001 as the Director of Equity Research, Jim was Director of Equity Research at ABN AMRO in New York and Chicago (1994-2000) and Equity Research Analyst at ABN AMRO following the Environmental Services Industry (1990-1994). He started his professional career in 1981 with Arthur Andersen & Co. in Detroit.



Paul J Long has challenged the traditional corporate landscape in sales and service beginning in 2004. He has leveraged this experience and his ability to connect with others for the last decade to engage audiences around the globe. With his fun-loving attitude, infectious spirit and philosophy of "fundamism," Paul has provided memorable experiences for countless engagements including but not limited to workshops, trade shows, keynotes and more. His shenanigans have been featured in media outlets like ESPN, the Washington Post and even the Wall Street Journal! Years ago, while working for a conservative call center in the highly conservative industry of insurance, Paul had a conversation with a manager and several other employees. "Are you always this upbeat and optimistic?" asked one of the call center employees. "Give it time," retorted the manager, "this place will get to him." From that day forth Paul decided not to allow experiences to shape others but rather motivate and engage others to create memorable experiences for themselves.

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Thanks to these
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