Iowa Trust Association *presents:*

FOCUS 2019

OCT. 2-4

IOWA TRUST ASSOCIATION ANNUAL FALL CONFERENCE

Gain the 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 2019 Fall Conference.

Peer groups, great speakers, exhibitors, continuing education credit and more!

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 11, 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 hours - 7.25. Activity # 329971
CFP hours – Seven sessions have been approved for credit by the CFP Board.
American Bankers Association (ABA) Professional Certifications has approved the following continuing education credits:

CISP	2.5	CRCM	5.25	CTFA	9

Conference Sponsors

Broadridge Financial Solutions, Inc.
CAPIS
EPIC Retirement Plan Services
Infovisa
MainStreet Advisors
Promontory Interfinancial Network, Inc.
ProxyTrust

Iowa Trust Association

2019 Iowa Trust Association Fall Conference

October 2-4, 2019 I West Des Moines Marriott

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 ______________________________

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Wednesday, October 2

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! This is a great opportunity to meet fellow trust industry professionals, while getting ideas on best practices, answering questions and developing resources. Conference registration is not required for this event and it 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. **Trustee Obligations: Avoiding Conflicts of Interest**

Bob Hodges, Brown Winick, Des Moines

This session will discuss the fiduciary duties owed by a trustee to the trust beneficiaries and provides some practical pointers for those serving as or working with trustees to avoid conflict of interests and potential claims.

1:30 p.m. **Group Discussion with Individual Peer Groups**

Thursday, October 3

8:30 a.m. **Registration & Exhibits Open**

9:00 a.m. **Welcome**

Brad VanHeuvelen, Peoples Bank, Sioux Center

9:05 a.m. **On the Economic, Political and Business Climate**

Roger Tutterow, Kennesaw State University

Over three years ago, we cleared important hurdles that were important steps back toward normalcy, now the question has shifted toward concern over the maturity of the expansion. In this session, Dr. Roger Tutterow provides a timely overview of the current global, national and regional economies and how we navigate into 2020. Special emphasis will be placed the linkages between the real estate markets and the recovery in the financial services sector, the effect of economic changes in the competitive landscape on institution profitability and performance, the outlook for consumer spending and the retail sector, the causes and effects of the recent volatility in oil prices, the effect of recent tax reform on economic performance and the implications of ongoing changes in the political and regulatory climate for the financial industry.

10:20 a.m. **Break with Exhibitors**

- *Sponsored by Promontory Interfinancial Network & CAPIS*

10:40 a.m. **IRA Mistakes and How to Fix Them**

Mike O'Brien, JM Consultants

Earnings accrue in IRAs on a tax-deferred basis. For Roth IRAs, qualified distributions of these earnings are tax-free. This tax treatment is the primary feature that often encourages individuals to accumulate their retirement savings in these accounts. However, years of savings and tax deferred growth can be lost because of mistakes. These mistakes range from missing deadlines for required distributions to performing ineligible rollovers, all of which can result in unintended tax consequences and/or IRS assessed excise penalties. During this seminar, you will get explanations of how to help your clients avoid making such mistakes, or help them correct those mistakes when possible.

11:45 a.m. **Vendor Recognition**

Noon **Lunch**

1:00 p.m. **Regulatory Update**

Phoebe Papageorgiou, American Bankers Association, 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.

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

- *Sponsored by Promontory Interfinancial Network & CAPIS*

2:20 p.m. **Managing Difficult Personalities in Estate, Trust and Business Succession Planning**

Christine Graham, UMB Bank, Kansas City, MO

Addiction and mental health issues present significant risks to family well-being and wealth preservation, and recent research suggests higher incidence of these issues within affluent communities. This presentation will address techniques for navigating special family dynamics where a situation involves individuals who face mental health or substance abuse challenges, autism spectrum and other executive functioning disorders.

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

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3:35 p.m. **Digital Assets – Who Gets Digital Stuff When You Log Off**
Robert Kirkland, Kirkland Woods & Martinsen LLP, Liberty, MO
This session will discuss digital property and the unique obstacles of planning for and administration of digital property. Learn planning techniques for digital property, the impact (or lack thereof) of the Revised Uniform Fiduciary Access to Digital Assets Act, and the many administrative tasks associated with digital property in an estate or trust.

4:35 p.m. **Reception with Exhibitors**
• *Sponsored by Broadridge Financial Solutions*

Friday, October 4

8:00 a.m. **Full Breakfast Buffet & Annual Meeting**
• *Sponsored by Infovisa*

8:45 a.m. **Recent Federal Tax and Estate Planning Developments**
Samuel A. Donaldson, Georgia State University
This informative and entertaining session will recap the significant cases, rulings, regulations, and legislation from the past 12 months in the fields of federal income, estate, and gift taxes of interest to estate planning professionals. Specific topics to be addressed include anti-clawback regulations, proposed regulations on the qualified business income deduction, qualified opportunity funds, marital deduction cases, family limited partnership cases, intergenerational split-dollar life insurance cases, and techniques for maximizing the step-up in basis at death.

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

10:00 a.m. **Communicate with Attitude**
Matt Booth, Dubuque, IA
With each step forward in technology, you seem to take a step back from others. More often than not, the inability to communicate effectively leaves you sitting on the sidelines watching others put points on the board and ultimately money in the bank. Success comes to people not because they are smarter or more talented than you, but because they can communicate their ideas clearly. Virtually every facet of your personal and professional life hangs more on the ability to communicate than on any other learnable skill. It has never been more important than now to present a clear message.

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

Featured Speakers

Roger Tutterow is Professor of Economics at Kennesaw State University. He also serves as Director of the Econometric Center, an applied research center housed in KSU's Coles College of Business. His analysis of the economic, business and political environments have been featured in a variety of media.In addition to his work in academia, Dr. Tutterow has served as a consultant on financial economics and statistical modeling for corporate clients ranging from Fortune 500 companies to closely held businesses. He also serves as Chief Economic Advisor for the Henssler Financial Group, an Atlanta-based investment advisory firm and as a strategic advisor to Georgia Oak Partners, an Georgia-focused private equity firm.

Robert Kirkland is the Founding Partner of the law firm of Kirkland Woods & Martinsen LLP, which has offices in Liberty, Missouri, Springfield, Missouri and Overland Park, Kansas. He is licensed to practice law in Missouri and Kansas. He works with a variety of individual clients, handling the preparation of Wills, Living Trusts, Durable Powers of Attorney, Irrevocable Trusts, Charitable Trusts and Minor's Trusts, and counseling clients in the areas of gifting techniques, asset protection, charitable planning and business succession planning. He also advises fiduciaries in estate, conservatorship and trust administration matters. Mr. Kirkland is a Fellow of the American College of Trust and Estate Counsel ("ACTEC"), is a past Missouri State Chair of ACTEC, and a past member of the ACTEC Board of Regents and ACTEC Executive Committee. He is also a member of the Employee Benefits Committee, Sponsorship Advisory Committee (Chair), Digital Property Task Force, Membership Selection Committee, Long Range Planning Committee, and Communications Committee of ACTEC.

Matt Booth's humor, quick wit, and ability to connect with your people will create meaningful attitude changes. Matt has enjoyed getting to share his message throughout the United States and with international audiences around the world.
Matt grew up on a farm in Southwest Wisconsin in the heartland of America. He lives in Dubuque, Iowa on the banks of a small creek that feeds into the mighty Mississippi with his lovely wife Joie and their sons Carter and Graham. He received his undergrad at University of Wisconsin and then graduated with his Master's Degree in Communication from University of Dubuque.

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