IOWA TRUST ASSOCIATION ANNUAL FALL CONFERENCE

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

Sept. 29 - Oct. 1, 2021
West Des Moines Marriott Hotel

While the last year has been an unprecedented challenging for all, this year's event will help you navigate the future of the trust industry. 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 2021 Fall Conference.

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 8, 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 questions.

Continuing Education Hours

CE hours pending for CLE, CFP, CISP, and CTFA. Totals will be announced prior to the conference.

Conference Exhibitors

(as of 7/14/21)

Accutech Systems
American Cancer Society
Broadridge Financial Services
BTC Capital Management
Christopher's Rare Coins
FCI Advisors
Fifth Third Bank
Infovisa
IntraFi Network
Lazard Asset Management
MainStreet Advisors
Peoples Company
ProxyTrust
Steffes Group

Iowa Trust Association

2021 Iowa Trust Association Fall Conference

Sept. 29 - Oct. 1, 2021 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

Also - Register online at www.iatrust.com

Company ____________________

Address ____________________

City, State, Zip ____________________

Phone ____________________

Name ____________________

E-Mail ____________________

Name ____________________

E-Mail ____________________

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Wednesday, September 29

12:00 p.m. ITA Peer Group Meetings (includes lunch)
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.

12:30 p.m. Regulatory Update and Panel
Roger Roland, Tracy Bergman, Iowa Division of Banking, Des Moines
Iowa Division of Banking examiners will share recent updates, examination findings and other information you should know as a trust officer. There will also be time for your questions.

1:30 p.m. Group Discussion

Thursday, September 30

8:30 a.m. Registration & Exhibits Open

9:00 a.m. Welcome
Craig Schrader, West Bank, Des Moines

9:05 a.m. What Happens Next
Mark Zinder, Economist
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.

10:20 a.m. Break with Exhibitors

10:40 a.m. 10 Critical IRA Errors Advisors Must Avoid
Jeff Levin, Kitces.com
Don't make these mistakes! For more than 40 years, IRAs have been available as a retirement-savings vehicle, but the rules surrounding them are constantly changing, and they are incredibly – and deceptively – complex. Each year, client mistakes, advisor errors and oversights by financial institutions cost clients millions of dollars in unnecessary taxation. During this session we will review the most common mistakes and oversights so you can help your clients avoid them and save money.

Noon Lunch

1:00 p.m. Regulatory Update – Via Zoom
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

2:20 p.m. Iowa Trust Code Updates including Decanting Trusts
Bob Hodges, Brown Winnick, Des Moines
This session will review recent changes in the Iowa Trust Code and include detailed information about decanting trusts.

3:20 p.m. Break with Exhibitors

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Thursday, September 30

3:35 p.m. **In Flow: Elevating One's Performance, Positivity, & Attitude**
Tom Westbrook, Drake University, Des Moines
One's energy state defines one's performance, positivity, and attitude. Discover the four energy quadrants and uncover where you fall between being in-flow and burned-out. You will also learn strategies for how to stay energized and positive in our crazy-busy world. Be prepared for some personally surprising insights!

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

Friday, October 1

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

8:45 a.m. **Fraudsters Toolbox: Targeting the Elderly**
Mike Burke, SHAZAM
The elderly are a top target for scam artists and financial crimes against this population are becoming more rampant in the age of social media. Find out the different ways fraudsters target these vulnerable citizens using spam and tech support scams, law enforcement and IRS scams, grandparent and romance scams, in addition to phone call scams. Learn how to recognize unusual account activity and use the provided tools to educate your senior cardholders. Select three topics to highlight in your program: Romance scam, law enforcement/IRS scam, Social Security scam, text spam scam, tech support scam, grandparent scam, secret shopper scam and Craigslist scam.

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

10:00 a.m. **Federal Tax Update and Estate Planning**
Sam Donaldson, Georgia State University, Atlanta
In light of recent developments, some estate planning strategies have become especially popular. This presentation explains and evaluates several "hot" planning ideas, including spousal lifetime access trusts, charitable remainder trusts as beneficiaries of retirement accounts, ultra-long-term GRATs, and incomplete gift non-grantor trusts.

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.

Sam Donaldson. Prior to joining GSU Law in 2012, Professor Donaldson was on the faculty at the University of Washington School of Law in Seattle for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law's Student Bar Association. Professor Donaldson served for two years as Associate Dean for Academic Administration and for six years as the Director of the law school's Graduate Program in Taxation. Professor Donaldson teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law and professional responsibility. He is a nationally recognized speaker on federal taxation and estate planning at professional conferences and continuing education seminars.

Jeffrey Levine is the Lead Financial Planning Nerd for Kitces.com, and is also the President of Fully Vested Advice, Inc., which provides financial education and consulting services to industry professionals. Jeffrey is also the Chief Planning Officer at Buckingham Wealth Partners and works closely with their team to create a seamless client experience that makes it easy to plan and instill confidence as they work towards their most important goals. He serves as a technical resource for advisors and the firm's primary thought leader regarding evidence-based planning concepts and strategies. Buckingham allows him to train and educate hundreds of advisors and support them in their pursuit of helping clients fulfill their financial dreams. He is a nationally-recognized and award-winning thought leader within the financial planning community.

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Featured Speakers cont.

Mike Burke is a veteran law enforcement professional with experience in criminal justice instruction, homeland security and fraud investigation. He guides SHAZAM clients to enhance their security measures and ensure regulatory compliance.

Robert D. Hodges is a member of BrownWinick and serves as the Chair of the firm's Wills, Estate and Probate Law practice group. Bob practices primarily in the areas of taxation, estate planning, and business law. Robert graduated from Central College, summa cum laude, in 2003, receiving his B.A. in Business Management. While at Central College, Robert was a member of the football team and was awarded the Wall Street Journal Award as the top business student in the class of 2003. Robert is a member of the Iowa State Bar Association and is a member of the Iowa State Bar Association's Military Affairs Committee. Robert was admitted to the Iowa bar in 2007. He is also a member of the Mid-Iowa Planned Giving Council and the Mid-Iowa Estate & Financial Planners. Robert has also been selected for inclusion in Super Lawyers as a Rising Star in the area of Taxation Law.

Phoebe A. Papageorgiou is the Senior Counsel for the Center for Securities, Trust and Investments at the American Bankers Association. She covers regulatory and legislative developments of interest to trust bankers. She manages the advocacy efforts of ABA's Trust Taxation Committee, following such issues as the tax deductibility of trustee fees, the reporting of cost basis in securities, and estate taxation. Before joining ABA, Phoebe worked for the U.S. Department of the Treasury in the Office of Domestic Finance. She received her law degree from the George Washington University Law School and her undergraduate degree from Carnegie Mellon University.

Tom Westbrook is Professor of Leadership Studies, Drake University (ret) & CEO of Learn Associates LLC. Tom is an active presenter at numerous corporations and organizations across the Midwest. His success at blending the theoretical aspects of leadership with practical, performance-based applications has won him praise as a master facilitator. Tom's company, Learn Associates LLC designs and offers leadership development, train the trainer, as well as organization development courses, institutes, and workshops. He is a featured speaker at numerous association meetings and annual conferences.

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Iowa Trust Association
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