

IOWA TRUST ASSOCIATION ANNUAL FALL CONFERENCE

Sept. 28 - 30, 2002
West Des Moines Marriott Hotel

Gain the expertise you need to remain a leader in the trust profession and achieve more in the future. With changing regulatory 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 2022 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 7, 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

CISP, CTFA, CLE and CTFA - pending

Conference Sponsors

Federated Hermes, Inc. MainStreet Advisors
Infovisa Steffes Group, Inc.

Conference Exhibitors (as of 8/3/22)

Accutech Systems Reich & Tang Deposit Solutions, LLC + Total Bank Solutions
American Cancer Society
BTC Capital Management Steffes Group, Inc.
Christopher's Rare Coins Summit Ag Management
Cohen and Steers T. Rowe Price
FCI Advisors Wright Investors' Service, Inc.
Federated Hermes, Inc.
Fifth Third Institutional Trust & Custody
Franklin Templeton
Infovisa
Lazard Asset Management
MainStreet Advisors
Peoples Company
ProxyTrust



2022 Iowa Trust Association Fall Conference

Sept. 28 - 30, 2022 | 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 _____

IOWA TRUST ASSOCIATION ANNUAL FALL CONFERENCE

Wednesday, September 28

12:00 p.m. ITA Peer Group Meetings & 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. Iowa Division of Banking Update & Panel

Roger Roland, Crystal Huisman, Tracy Bergmann, Iowa Division of Banking, Des Moines

IDOB staff will provide an update on regulatory and exam issues. There will also be time for questions.

1:30 p.m. Group Discussion

Thursday, September 29

8:30 a.m. Registration & Exhibits Open

9:00 a.m. Welcome

Nathaniel Tagtow, City State Bank

9:05 a.m. How to Deliver Stunning Bottom-Line Results

Michael Veltri

This powerful session will show you how to master the 5 most powerful decision-making solutions that you've never heard of. You will discover how to build a culture that celebrates fresh thinking and embraces new decision-making ideas as well as how to implement better decision-making skills on a daily basis across all business activities and roles. Learn to avoid the 5 biggest decision-making traps that kill successful organizations as you apply best decision-making practices from successful companies worldwide.

10:20 a.m. Break with Exhibitors

10:40 a.m. Making Sense of Cryptocurrency

Manish Nathwani, SHAZAM

There are many challenges and opportunities traditional finance now faces with this newly created asset class. This session will explore what cryptocurrency is, the security and ownership surrounding it, and the regulatory and legal hurdles faced.

11:45 a.m. Vendor Recognition

Noon Lunch

1:00 p.m. Trust Regulatory and Legislative Update

Tim Keehan, American Bankers Association, Washington, D.C.

This session will recap the most important regulatory and legislative hot topics impacting trust and wealth.

2:00 p.m. Break with Exhibitors

2:20 p.m. Ethics: Just Because You Can, Doesn't Mean You Should

Bob Hodges, Brown Winnick, Des Moines

A trust officer is required to be well-versed in a variety of subjects, including tax, investments and trust laws. However, what is often neglected is the need for the trust officer to understand the ethical responsibilities of the position. This session will cover not only the laws and regulations that affect the ethical duties of trust officers but also will examine where liability can arise when the trust officer forgets the fundamental rule that just because the law says you can do it, doesn't mean you should.

3:20 p.m. Break with Exhibitors

3:35 p.m. The SECURE Act Changes Retirement (and Other) Planning Ascensus

Effective as of January 1, 2020, the Setting Every Community Up for Retirement Enhancement (SECURE) Act, ushered in the most significant direct changes to the laws for retirement accounts since the Pension Protection Act of 2006. The 'headline' from the SECURE Act was its changes to the 'stretch' rules for designated beneficiaries, but that's far from the only change that will impact advisors and their clients. In this session, attendees will learn about each of the major changes made by the SECURE Act, what we've learned in the past couple years dealing with the SECURE Act, and explore both the new challenges, and planning opportunities, it creates.

4:35 p.m. Reception with Exhibitors

Friday, September 30

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

8:45 a.m. Macroeconomic and Interest Rate Outlook

Dr. Ed Seifried, Seifried & Brew

Listen to the latest economic outlook from Dr. Ed Seifried, economist, university professor and nationally recognized speaker and author. In his presentation, Dr. Seifried shares insights and reactions following the release of major economic reports, including FOMC meetings and GDP releases.

9:45 a.m. Break

10:00 a.m. The \$80 Billion Gamble

Terry Rich, retired President and CEO of the Iowa Lottery

Your day's going great... and then you get the unexpected call that a fraud may have occurred under your watch. Your decision and direction could affect jobs, your business and personal friendships. As most companies focus on external hacking and fraud, Terry Rich will discuss an internal vendor fraud case to explore how established checks and balances, and a little luck, helped crack the largest lottery fraud in US history.

11:15 a.m. Adjourn

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Infovisa

MainStreet Advisors

Steffes Group, Inc.