

Financial Institutions Conference

ISCPA
IOWA SOCIETY OF CPAs

Agenda

8-8:10 a.m. | ISCPA update and welcome messages

Lindsey Haley | ISCPA Director of Membership and Business Development

Grant Rolfes, CPA | Committee Chair
CliftonLarsonAllen LLP

POLK ROOM | CHANNEL 1

8:10-9 a.m. | The Economy and Regulations: Where Do We Go From Here?

Brandon Koeser, CPA | RSM US LLP

POLK ROOM | CHANNEL 1

9-9:15 a.m. | Break

9:15-10:30 a.m. | Breakout sessions

Bank Tax Update

Paul Cain, CPA; Rachel Scheve, CPA; Kim Wernimont, CPA
RSM US LLP

POLK ROOM | CHANNEL 1

Cryptocurrency and Fraud

Michael "Bret" Hood | 21st Century Learning & Consulting

DALLAS ROOM | CHANNEL 2

10:30-10:45 a.m. | Break

10:45-Noon | The Depository Balance Sheet: Make an Action Plan

Ryan Smith | Piper Sandler

POLK ROOM | CHANNEL 1

Noon-12:45 p.m. | Lunch break

12:45-1:35 p.m. | The Regulatory Landscape: Insights from Experts

David Redenbaugh | FDIC
Jeff Plagge | Iowa Division of Banking
Chad Jorgensen | Federal Reserve
Shelley Hardisty | Iowa Bankers Association
Michael Holdren, CPA | Eide Bailly LLP (moderator)

POLK ROOM | CHANNEL 1

1:35-1:50 p.m. | Break

1:50-2:40 p.m. | Breakout sessions

The Turbulent World of Bank M&As in Uncharted Waters

Elissa Holman, Howard Hagen, Amy Plummer
Dickinson, Mackaman, Tyler & Hagen P.C.

POLK ROOM | CHANNEL 1

The Dark Triad of Ethicality: How Illusory Superiority, Bounded Ethicality, and Confirmation Bias Impact Ethical Decision-Making

Michael "Bret" Hood | 21st Century Learning & Consulting

DALLAS ROOM | CHANNEL 2

This session qualifies for one (1) hour of ethics CPE credit.
Separate sign-in required for in-person attendees.

2:40-2:55 p.m. | Break

2:55-3:45 p.m. | Breakout sessions

Credit Risk in the Current Day

Ed Riegl | CliftonLarsonAllen LLP

POLK ROOM | CHANNEL 1

Call Report Updates and Changes

Andrea Lambert | 3PR

DALLAS ROOM | CHANNEL 2

3:45-3:55 p.m. | Break

3:55-4:45 p.m. | Navigating the Future of Banking: A CEO & CFO Perspective

Jim Plagge | President & CEO, Bank Iowa
Erik Sorensen | CFO, Community Choice Credit Union
Laurie Vitzthum | CEO & President, Iowa State Bank
Ben Currie, CPA | CFO, TruBank (moderator)

POLK ROOM | CHANNEL 1