

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

Lindsey Haley | ISCPA Director of Membership and Business Development

*Grant Rolfes, CPA | 2023-2024 Committee Chair
CliftonLarsonAllen LLP*

Concord AB | Channel 1

8:10-9:10 a.m. | Discovering Opportunities Amid Uncertainty: An Economic Discussion

*KC Mathews, MBA, CFA
Commerce Trust*

Concord AB | Channel 1

9:10-9:20 a.m. | Break

9:20-10:15 a.m. | Breakout sessions

Partnering with FinTech

*Erik Sorensen
Community Choice Credit Union*

Concord AB | Channel 1

Understanding the Current Climate of ESG

*Brandon Koeser
RSM*

Salon A | Channel 2

10:15-10:25 a.m. | Break

10:25-11:20 a.m. | Moving Technology Strategy to Execution

*Aaron Donaldson | RSM
Kevin Larkin | Federal Home Loan Bank of Des Moines
Julie Starnes | RSM
Jerry Warrick | RSM (moderator)
Corey Weeklund | RSM*

Concord AB | Channel 1

11:20 a.m.-12:05 p.m. | Lunch

Concord C

12:05-1:05 p.m. | Managing Your Balance Sheet Through a Not Your Average Recession: Soft Landing or Is the Perfect Storm on the Horizon?

*Frank Farone
Darling Consulting Group*

Concord AB | Channel 1

1:05-1:15 p.m. | Break

1:15-2:10 p.m. | 2024 Tax Update for Financial Institutions

*Paul Cain, CPA; Rachel Scheve, CPA; Kimberly Wernimont, CPA
RSM US LLP*

Concord AB | Channel 1

2:10-2:20 p.m. | Break

2:20-3:15 p.m. | Breakout sessions

Interest Rate Derivatives: How Banks Use Customer Swap Programs to Win Deals, Boost Loan Yield and Grow Fee Income

*Ramon Rodriguez
Derivative Path*

Concord AB | Channel 1

Ethics, Integrity and Accountability 2024: How Are We Doing?

*Tom Westbrook, Ph.D
Drake University*

Salon A | Channel 2

3:15-3:25 | Break

3:25-4:25 p.m. | Navigating the Future of Banking: Industry Leader Perspectives

*James Johnson | PCSB Bank and Iowa Superintendent of Banking
Heather Miller | Freedom Financial Bank and VisionBank
Mitch Van Kley, CPA | Iowa Bankers Insurance and Services (moderator)
Carmen Wooley | Affinity CU*

Concord AB | Channel 1