

Mid-Winter Management Conference

January 15-17, 2023

Hyatt Regency Indian Wells Resort & Spa

44600 Indian Wells Ln,
Indian Wells, CA 92210

Contact Maggie Feldmann for more
information at:

✉ mfeldmann@iowabankers.com

☎ 515-286-4372

Conference Agenda

Sunday, January 15

5:30 – 7:30 p.m.

Welcome Reception & Shots in the Night

Indian Wells Golf Resort

All Attendees

Address: 44-500 Indian Wells Lane,
Indian Wells, CA

Monday, January 16

8–8:45 a.m.

Breakfast & Iowa Banking Update

Jeff Plagge, Iowa Division of Banking

Sunset Room at Hyatt Regency Indian Wells Resort
Bankers and Sponsors Only

Address: 44600 Indian Wells Lane,
Indian Wells, CA

8:45–9:45 a.m.

Session 1 – Economic Update

9:45–11 a.m.

Session 2 – Investments

Forcing ourselves outside our comfort zone can help us achieve maximum results

Josh Kiefer, Country Club Bank Capital Markets Group

12 p.m.

Four Person Best Shot Golf Tournament

Indian Wells Golf Resort

Noon shotgun start. \$200 per person

All Attendees — Additional cost

Address: 44-500 Indian Wells Lane,
Indian Wells, CA

6:30–9 p.m.

Dinner

Verbena Terrace at Hyatt Regency Indian Wells Resort
All Attendees

Address: 44600 Indian Wells Lane,
Indian Wells, CA

Tuesday, January 17

8–9 a.m.

Session 3 – Iowa Tax Update

Terry Merfeld, Eide Bailly, LLP

9–10 a.m.

Session 4 – Legislative Update

Kirsten Sutton, American Bankers Association

Speaker Profiles



Josh Kiefer

Country Club Bank Capital Markets Group

Raised in Burnsville, MN, Josh is a 2004 graduate of North Dakota State University, Fargo, North Dakota where he earned a bachelor's degree in Business Administration with a concentration in Finance.

Josh has been in the Banking industry since graduation. Shortly after joining Country Club Bank in 2005, Josh began a management program during which time he took residency in various departments before joining the Capital Markets Group.



Terry Merfeld, CPA

Eide Bailly, LLP

Terry has more than 27 years of experience in multiple areas of taxation, 25 years of them working directly with banks ranging in size from \$25 million in assets to over \$6 billion. He has performed extensive consulting and tax compliance services, with a focus on small and middle-market privately held businesses that are both C-Corporations and S-Corporation entities. He also assists with identifying the tax impact of transactions as clients consider their options in growing and transitioning their businesses for the future.



Kirsten Sutton

American Bankers Association

Kirsten Sutton is Executive Vice President of Congressional Relations and Legislative Affairs at the American Bankers Association (ABA), the voice of the nation's \$23.7 trillion banking industry and its more than two million employees. In this role, Sutton oversees the association's bipartisan team responsible for engaging lawmakers and their staff on policy and legislative issues affecting America's banks and the communities they serve. Sutton joined ABA in 2020 as Senior Vice President and Executive Director of ABA's Card Policy Council (CPC), where she developed policy priorities and advocacy strategy in collaboration with the nation's largest card-issuing banks and payment networks. Before joining ABA, Sutton served as Chief of Staff of the Consumer Financial Protection Bureau (CFPB) from 2018 to 2020. In addition to advising the CFPB Director on policy and personnel matters, Sutton managed the agency's public affairs, communications, stakeholder engagement, and legislative affairs office. Prior to her tenure at the CFPB, Sutton was staff director of the House Financial Services Committee (HFSC) where she served as primary staff liaison to the Administration and House and Senate leadership, developed the Committee's legislative priorities, and was responsible for ensuring those priorities had the support needed to pass out of the Committee and on the House floor. Her career on Capitol Hill spans more than a decade, including the financial crisis and the passage of the Dodd-Frank Act.

Registration Form

January 15-17, 2023 • Indian Wells, California



*Name: _____
Spouse/Guest: _____
Children & ages: _____
*Bank: _____
*Mailing Address: _____
*City: _____ *State: _____ *ZIP: _____
*Arrival Date: _____
*Departure Date: _____
*Phone: _____
*Cell Phone: _____
*Email: _____

Costs

Bankers: _____ @ \$450 = _____
Spouse/Guest: _____ @ \$285 = _____
Teens 13-20: _____ @ \$150 = _____
Children under 12: _____ @ \$85 ea.= _____
Golf: _____ @ \$200 ea.= _____
Total: _____

Payment Choice (Check one)

___ Bill my institution
___ Check made payable to Iowa Bankers Association
___ Master Card
___ Visa
___ American Express

If paying by credit card, please complete the following:

*Card Number: _____ Exp. Date: _____ 3-digit Security Code: _____
*Card Holder Name: _____
*Card Billing Address: _____
*City: _____ *State: _____ *ZIP: _____
*Card Holder Signature: _____

***Required Information**

Making Your Reservations

Hotel Reservations — Special room rate is \$289 per night (Jan. 12-19).
The room block cut-off date is Dec. 21, 2022. Reserve a room [online](#).

Golf Reservations — Golf registration is \$200 per person.

Golf Registration

1. Name _____ \$200
E-mail _____
2. Name _____ \$200
E-mail _____

List your foursome here:

(Please note, listing individuals here does not automatically register them.)

1. _____
2. _____
3. _____
4. _____

Mail this form with payment to:

Attn: Maggie Feldmann
Iowa Bankers Association
8901 Northpark Drive
Johnston, IA 50131

Registration Deadline:

December 9, 2022

Please contact Maggie Feldmann with any additional questions
at 515-286-4372 or by email at mfeldmann@iowabankers.com.