

# Mid-Winter Management Conference

JANUARY 7-9, 2024

## THE PINES LODGE

141 Scott Hill Road  
Beaver Creek, Colorado

## RESERVATIONS

855-332-1601

*(attendees must call for reservations)*

Cut-off Date: December 8, 2023



## Sponsors



Contact Maggie Klocke for more information at [mklocke@iowabankers.com](mailto:mklocke@iowabankers.com) or 515-286-4372.

# Conference Agenda

## SUNDAY, JANUARY 7

5:30-8 p.m.

### WELCOME RECEPTION

The Pines Lodge, Alpine Ballroom  
(All Attendees)

## MONDAY, JANUARY 8

7-9 a.m.

### BREAKFAST MEETING

The Pines Lodge, Alpine Ballroom  
(Bankers & Sponsors)

#### Around the Table

#### Session 1: Economic Update and Discussion on U.S. and Regional Trends

Nick Sly, Federal Reserve Bank of Kansas City,  
Denver Branch

#### Session 2: Iowa State Income Tax Update

Blake Crow, CPA, MBT, Eide Bailly, LLP

6-8 p.m.

### DINNER AT CITREA

60 Avondale Lane, Avon, Colorado  
(All Attendees)

Meet in the lobby at 5:40 p.m. (shuttle)

## TUESDAY, JANUARY 9

7-9 a.m.

### BREAKFAST MEETING

The Pines Lodge, Alpine Ballroom  
(Bankers & Sponsors)

#### Session 3: The Power of Generative AI in Banking: Benefits, Challenges, and Risks

Mark Scholl, Wipfli

#### Session 4: Solving the Liquidity Challenge

Joe Kennerson, Darling Consulting Group

## Speaker Profiles



### NICK SLY

Federal Reserve Bank of Kansas City,  
Denver Branch

Nicholas Sly is Vice President and Denver Branch Executive at the Federal Reserve Bank of Kansas City. In this role, he serves as the Bank's regional economist and its representative in the states of Colorado, Wyoming and in northern New Mexico. Mr. Sly works closely with the Branch's board of directors and is responsible for briefing the President of the Federal Reserve Bank of Kansas City on economic conditions in the Denver branch's region.



### BLAKE CROW, CPA, MBT

Eide Bailly, LLP

Blake Crow provides management consulting, tax planning and tax compliance services to financial institutions ranging in size from less than \$20 million to more than \$2.4 billion. He conducts tax research projects and assists financial institutions with merger and acquisition issues.



### MARK SCHOLL

Wipfli

Mark Scholl is a principal in the firm's risk advisory and forensics practice. With more than 30 years of experience, he specializes in all aspects of technology services for the firm primarily for the financial institution industry, including information security and perimeter vulnerability assessments, IT risk assessments, network design and support, and IT training. In addition, Mark has an internal leadership role as the Illinois market leader, responsible for oversight and growth.



### JOE KENNERSON

Darling Consulting Group

Joe is a Managing Director at Darling Consulting Group, where he works directly with senior management teams on building customized balance sheet strategies to improve earnings and manage risk. Joe strives to be an expert in overall Asset Liability Management and educates ALCOs in the inevitable balance of financial performance and regulatory appeasement. Joe speaks at numerous industry associations reaching thousands of bankers every year. He is an expert at helping bring clarity to the complex and delivers a high level of energy to his ALM presentations. Joe has been with DCG since 2005, where he has benefited from working with nearly a thousand ALCOs throughout the country on ALM and strategic initiatives.

# Registration Form

January 7-9, 2024 • The Pines Lodge, Colorado

\*Name: \_\_\_\_\_

Spouse/Guest: \_\_\_\_\_

Children & ages: \_\_\_\_\_

\*Bank: \_\_\_\_\_

\*Mailing Address: \_\_\_\_\_

\*City: \_\_\_\_\_ \*State: \_\_\_\_\_ \*ZIP: \_\_\_\_\_

\*Arrival Date: \_\_\_\_\_

\*Departure Date: \_\_\_\_\_

\*Phone: \_\_\_\_\_

\*Cell Phone: \_\_\_\_\_

\*Email: \_\_\_\_\_

## MAKING YOUR RESERVATIONS

**Hotel Reservations** — Attendees must call for reservations.  
The hotel phone number is 855-332-1601. The event code is: BBCIBA24.

## COSTS

IBA Member: \_\_\_\_\_ @ \$595= \_\_\_\_\_

Spouse/Guest: \_\_\_\_\_ @ \$395 = \_\_\_\_\_

Child: \_\_\_\_\_ @ \$150 = \_\_\_\_\_

(20 and under)

Total: \_\_\_\_\_

### Mail this form with payment to:

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

## 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**

### Registration Deadline:

December 8, 2023

Please contact Maggie Klocke with any additional questions  
at 515-286-4372 or by email at [mklocke@iowabankers.com](mailto:mklocke@iowabankers.com).