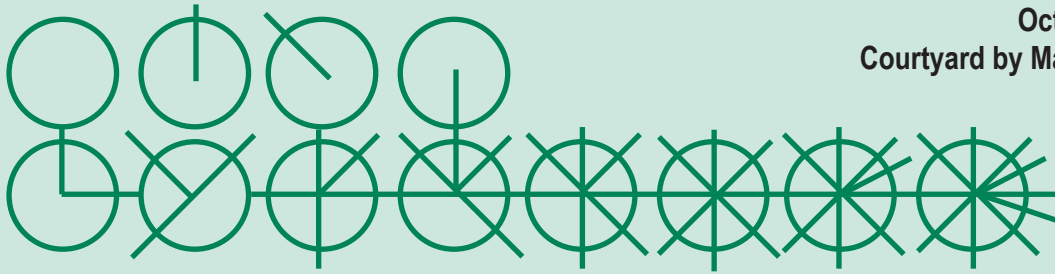


2010 Iowa Trust Association Fall Conference

October 7-8, 2010
Courtyard by Marriott, Ankeny



TRUST BANKING IN A COMPLEX WORLD

Gain the knowledge you need to remain a leader in the trust profession. With changing regulations, an unsure economy and the increasing need to stay current, the Iowa Trust Association is proud to offer the 2010 Annual Conference. Held over two days, the event offers up-to-date information from industry experts. This year vendors will join us with their latest products and services for the trust industry. The annual event is a great opportunity to stay current with industry events and network with your peers from across the state. Use the attached form to register today!

Location

Courtyard by Marriott Ankeny

2405 SE Creekview Dr., Ankeny
Ph. 515-422-5555

Rate: \$99.00

A block of rooms has been reserved at the Courtyard by Marriott Ankeny. Reserve your rooms with the hotel directly. Request the ITA room block for conference rates. After September 16, rooms are available on space available basis only.

Questions

Call the Iowa Trust Association at 800-800-2353 with any questions.

Registration

Conference registration includes all general and concurrent sessions, two lunches, breaks and Thursday evening's reception.

	Advance	At Door
Members	\$225	\$245
Nonmember	\$275	\$295
2nd Member	\$195	\$205
2nd Nonmember	\$245	\$275
One Day Member	\$125	\$145
One Day Nonmember	\$175	\$195

Continuing Education Hours

Attendees at the Iowa Trust Association will qualify for continuing education hours. CLE and CTFA hours have been applied for.

Iowa Trust



Association

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Send form with payment to:

Attn: Registrar, Iowa Trust Association
PO Box 6200, Johnston, IA 50131

Fax: 515-280-4140

Company _____

Address _____

City, State, Zip _____

Phone _____

Name _____

E-Mail _____

Both Days First Day Second Day

Name _____

E-Mail _____

Both Days First Day Second Day

2010 Iowa Trust Association Fall Conference



Thursday, Oct. 7, 2010

- 8:45 a.m. Registration & Exhibits Open**
- 9:00 a.m. Welcome**
Paula Petersburg, Clear Lake Bank & Trust, Clear Lake
- 9:05 a.m. Risk and Reward - Is Optimum Risk Adjusted Revenue Being Generated?**
Donald F. Moore, Jr., CEO, Bearmoor, LLC
The wealth management and trust business has a tremendous amount of risk associated with it; the reward generated from providing services is not always commensurate with the risk taken on, and, at a certain point the reward or profitability is no longer sustainable. Through an analysis of industry data and an understanding of the key risk indicators, KRI's, for the wealth and trust business, this session will provide insights on how to grow top line revenue while mitigating risks. Various best practices will be discussed, including how a consistent process addressing revenue enhancement opportunities will provide for optimum risk-adjusted revenue within the Wealth Management and Trust business line.
- 10:20 a.m. Break with Exhibitors**
- 10:40 a.m. Economic Update**
Ernie Goss, Creighton University, Omaha
Ernest Goss is the MacAllister Chair in Regional Economics at Creighton University in Omaha, Nebraska. Among his many accomplishments, Dr. Goss has published more than eighty research studies focusing primarily on economic forecasting and on the statistical analysis business and economic data.
- 11:50 a.m. Vendor Recognition & Lunch**
- 1:00 p.m. BREAKOUT SESSIONS**
- 1. Ethics & Changing Technology**
Melinda Ward, Van Osdal & Magruder, PC, Kansas City, MO
How has changing technology impacted the trust industry? This session will cover the ethical dilemmas created by the use of wireless communications, cell phones, and Meta data. It will define the reasonable expectation of confidentiality in light of the ease of intercepting wireless conversations and what the courts say regarding privilege and wireless communications, and inadvertent disclosures.
- 2. Farm Management**
Michael Duffy, Ph.D., Iowa State University
Learn more to help your clients make better business decisions that will strengthen both the current and future potential of an agricultural operation. This session will discuss land owner demographics, land values and using a trust as a means of transferring land.
- 3. Disaster Recovery**
RSM McGladrey, Cedar Rapids, IA
A serious incident can occur at any time and banks must plan for disaster recovery every step of the way. The key to successful disaster recovery is what happens long before a disaster strikes. With a realistic recovery plan, properly tested and committed to by senior management, banks can effectively maintain operations while providing for the safety of people and assets. Learn some of the key ideas to successful disaster recovery from the experts and from those who have been through the experience.

Thursday, Oct. 7, 2010 cont.

- 2:00 p.m. Break with Exhibitors**
- 2:20 p.m. Breakout Sessions**
- 3:20 p.m. Break with Exhibitors**
- 3:35 p.m. Washington Update**
Sally Miller, American Bankers Association, Washington, D.C.
Learn more about what's new on the national trust scene with proposed and pending legislation, new regulations and current issues that will affect you as a trust professional. Ms. Miller will review recent developments coming from Congress and the regulatory agencies and assess their impact on the wealth management, charitable and employee benefit business lines.
- 4:35 p.m. Reception with Exhibitors**
- Friday, Oct. 8, 2010**
- 8:00 a.m. Registration/Continental Breakfast**
- 8:30 a.m. What's New with the Trust Code**
Sue Pence, Bankers Trust Company, Cedar Rapids, IA
This session will provide an update on changes to the Iowa Trust code and what you need to know as a trust professional.
- 9:30 a.m. Break**
- 9:40 a.m. The Fix in Fixed Income Investing**
Jon Augustine, CFA; Annette Shaw, CFA; and Jeff Birdsley, CFA, AIAF, BTC Capital Management
The events we have witnessed in the financial markets over the past three years have redefined the meaning of risk when applied to clients' fixed income portfolios. Learn more about management of fixed income allocations in clients' investment portfolios in today's low interest rate environment. Does a "buy & hold" approach work? What are our yield expectations and future outlook for the fixed income markets? Is there truly a "new normal" and, if so, how do we effectively manage client expectations as well as successfully navigate the increasingly turbulent fixed income markets?
- 10:15 a.m. Break**
- 10:30 a.m. Your Customer's Experience – Will It Win, Wow, or Worry?**
Jeff Rendel, Rising Above Enterprises, Carona, CA
The Customer Revolution is in full swing. Every customer touch point offers your company an opportunity to maximize the customer experience. Strategically investing in and managing the customer experience is a business tool that integrates the entire organization in its desire to connect with your customers. In dissecting, designing, measuring, and improving your customer's experience with your product or service, your company can transform its image and brand, making you more essential – more indispensable – to your customer's life. With clearly-defined and well-implemented front line leadership behaviors, the "how" of "wow" is delineated, allowing you to understand and demonstrate your distinctiveness in a jam-packed marketplace. In a world where first-rate customer service is the expected norm, it's time to abandon being just competitive and concentrate on becoming a required, central part of life.
- 12:00 p.m. Annual Meeting & Lunch**
- 1:15 p.m. Adjourn**