building relationships......

CREATING TRUST

Iowa Trust Association Fall Conference

Oct. 6-8, 2025 • West Des Moines Marriott Hotel

Gain the expertise you need to remain a leader in the trust profession. With changing regulations, an unsure economy, different products and services in the trust department you must employ new strategies to keep current. To help, the Iowa Trust Association invites you to attend the 2025 Fall Conference. This year's conference includes sessions on special needs trusts, trust distributions, compliance, and fiduciary tax returns. We'll also take a look at how you can be more effective with goal setting and time management. Join your peers for this annual event and create the trust you need to help your clients, your organization, while you enhance your professional skills.

Location

West Des Moines Marriott
1250 Jordan Creek Parkway, West Des Moines
Ph. 515-267-1500 Rate: $145
A block of rooms has been reserved at the West Des Moines Marriott. Request the ITA room block for conference rates. After September 15, rooms are available on space available basis only.

Conference Website

Additional information and a complete list of conference exhibitors and sponsors is available on the ITA website at www.iatrust.com under the Events Tab.

Questions

Call the Iowa Trust Association at 800-987-7365 with questions.

Continuing Education Hours

CLE 8.0 hours (1 wellness hour) #427182
CTFA 10.5 (approved as Iowa Bankers Association | ITA 2025 Fall Conference)
CRCM 2.5 (approved as Iowa Bankers Association | ITA 2025 Fall Conference)

Exhibitors (as of June 26)

American Cancer Society
Broadridge
BTC Capital Management
CAPIS
Cheetah
Cohen and Steers
Farmers National Company
Federated Hermes, Inc.
Fifth Third Institutional Services
Infovisa
MainStreet Advisors
Peoples Company
Steffes Auctioneers
Superior IRA & HSA
Whitaker Marketing Group

Sponsors

BTC Capital Management
Cheetah
Federated Hermes, Inc.
Infovisa
MainStreet Advisors
Steffes Auctioneers

Iowa Trust Association

2025 Iowa Trust Association Fall Conference

Oct. 6-8, 2025 l West Des Moines Marriott

Registration

Conference registration includes all general and concurrent sessions, lunch, breaks and Tuesday evening's reception and Wednesday's breakfast.

Members $275
Nonmember $450

Send form with payment to:
Attn: Registrar, Iowa Trust Association
8901 Northpark Dr. Johnston, IA 50131

Also - Register online at www.iatrust.com

Company ____________________

Address ____________________

City, State, Zip ____________________

Phone ____________________

Name ____________________

E-Mail ____________________

Name ____________________

E-Mail ____________________

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Iowa Trust Association Fall Conference

Monday, Oct. 6

12:00 pm **ITA Peer Group Meetings**
Join your peers prior to the conference for an afternoon of discussion on ideas that pertain to you! This is a great opportunity to meet fellow trust industry professionals, while getting ideas on best practices, answering questions and developing resources.

12:30 pm **Regulatory Update**
Andy Giltner, Federal Reserve Bank of Chicago

1:30 pm **Group Discussion**

Tuesday, Oct. 7

8:30 am **Registration & Exhibits Open**
Breakfast sponsored by Infovisa

9:00 am **Welcome**
David McAlpine, Peoples Bank

9:05 am **Economic Update**
Greg Sweeney, Chief Investment Strategist, Bell Bank
With over 40 years of experience in the financial services industry, Sweeney will share insights on the current economic environment, as well as some observations about what this means for Iowa bankers and trust officers.

10:20 am **Break with Exhibitors**
Sponsored by BTC Capital Management, Cheetah, and MainStreet Advisors

10:40 am **Special Needs Trusts and Crisis Planning**
Gregory Kenyon, Dickinson Bradshaw, Des Moines
Disability planning and special needs trust administration are fraught with pitfalls and hazards. A simple distribution can wreak havoc with disability payments. We all hope our families will plan, but too often this planning is done during a crisis. This session will review the basics of Special Needs Trust and what you can and cannot do.

11:45 am **Lunch**
Sponsored by Federated Hermes

1:00 pm **Navigating Discretionary Trust Distributions**
Kyle Irvin, Crary Huff, Sioux City
This session will examine the complexities of discretionary trust distributions, a crucial aspect of trust administration. It will explore the meaning of a trustee's "discretion" when making distributions, and how this affects beneficiary rights and expectations. Key topics include defining discretionary distributions, roles and duties, distribution standards, and factors influencing distribution decisions. Kyle will also share some examples from real-world examples.

2:00 pm **Break with Exhibitors**
Sponsored by BTC Capital Management, Cheetah, and MainStreet Advisors

2:20 pm **Beneficiary Distributions**
Heidi LeMieur, Superior IRA & HSA
This session will share information about beneficiary distribution options focusing on different rules and options with a trust as a beneficiary. We'll explore the options available under the SECURE Act and the 10-year rule. We will also review common IRA distribution and beneficiary mistakes.

3:20 pm **Break with Exhibitors**
Sponsored by BTC Capital Management, Cheetah, and MainStreet Advisors

3:35 pm **Compliance in the Trust Department**
Jamie Schupp, Pohl & Associates
Effective compliance is a crucial component. This session will talk about regulatory expectations, what some of the top issues that are being flagged by regulators and what you should be thinking about for future exams. This is a great opportunity to bring your questions and hear what other trust officers are thinking about from a regulatory compliance standpoint.

4:35 pm **Reception with Exhibitors**
Sponsored by Steffes Auctioneers

Wednesday, Oct. 8

8:00 am **Full Breakfast Buffet & Annual Meeting**

8:45 am **What you need to know about Fiduciary Tax Returns**
Art Werner, Werner-Rocca Seminars
This session is a practical overview of fiduciary income tax returns, focusing on key issues trust officers and attorneys encounter when working with estates and trusts. While not a deep dive into every line of Form 1041, it will highlight the core concepts behind fiduciary filings—decedent's final returns, distributable net income (DNI), income in respect of a decedent (IRD), and how trust document provisions can impact tax outcomes. Ask better questions, spot red flags, and collaborate more effectively with tax professionals and beneficiaries.

9:45 am **Break**

10:00 am **Making the Most of our Time**
Susan Parker, Sparker Solutions
This keynote is designed to equip attendees with actionable strategies to optimize productivity by aligning big-picture goals with day-to-day priorities across all areas of responsibility. Through individual reflection and table activities, participants will leave with ready-to-use tools to enhance their time management immediately. We will focus on the following key objectives so that every attendee is able to walk away with actions to implement to help them better manage their time.

11:15 am **Adjourn**