Oct. 21-23, 2026 • West Des Moines Marriott Hotel

IOWA TRUST ASSOCIATION
FALL CONFERENCE

Gain the expertise you need to remain a leader in the trust profession. The Iowa Trust Association invites you to attend the 2026 Fall Conference. This year's conference includes sessions on the current economic outlook, estate planning, AI and regulatory compliance, special needs trusts, Iowa Medicaid estate recovery, administering discretionary trusts, and addressing change. 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: $149
A block of rooms has been reserved at the West Des Moines Marriott. Request the ITA room block for conference rates. After Oct. 1, 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 7.0 hours #442228
CTFA 8.5 (approved as ITA 2026Fall Conference - Trust)
CRCM, CERP 4.5 (approved as ITA 2026Fall Conference - Trust)

Exhibitors (as of June 15)

American Cancer Society
Broadridge Financial Solutions
BTC Capital Management
CAPIS
Deloitte
Farmers National Company
Federated Hermes
Fifth Third Institutional Services
Hertz Farm Management
Infovisa, Inc.
Introductions Real Estate
MainStreet Advisors
Peoples Company
Steffes Group, Inc.

Sponsors

Federated Hermes, Inc.
Infovisa, Inc.
MainStreet Advisors
Steffes Group, Inc.

2026 Iowa Trust Association Fall Conference

Oct. 21-23, 2026 I 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	$325
Nonmember	$650

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 ______________________

IOWA TRUST ASSOCIATION

FALL CONFERENCE

Wednesday, Oct. 21

12:00 p.m. Lunch & 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. Conference registration is not required for this event and wit open to anyone who would like to attend. Please contact ITA's Darcy Burnett at dburnett@iowabankers.com for more information.

12:30 p.m. Iowa Division of Banking Update
Roger Roland, Crystal Huisman, Tracy Bergmann; IDOB; Des Moines
Trust examiners from the Iowa Division of Banking will provide an update on hot topics and answer your questions.

1:30 p.m. Group Discussion

Thursday, Oct. 22

8:30 a.m. Registration & Exhibits Open

9:00 a.m. Welcome
Nicole Olson, First Citizens Bank, Mason City

9:05 a.m. Economic Outlook: What Leaders need to Know about Markets, Policy, and Global Risk
Dr. Sung Won Sohn
Today's economic environment is being shaped by rapid policy shifts, geopolitical uncertainty, financial market volatility, and the accelerating influence of artificial intelligence. In this timely and insightful program, business leaders will gain a clear understanding of where the U.S. and global economies are headed and what those trends mean for strategic decision making. Attendees will learn how inflation, interest rates, labor markets, government policy, and global instability are impacting growth, investment, and long-term planning. This session translates complex economic forces into practical business insight, helping organizations make smarter decisions and build resilience in an increasingly unpredictable world.

10:15 a.m. Break with Exhibitors

10:45 a.m. Estate Planning After OBBBA: Turning Theory into Practice
Michael Miranda, Miranda CPA & Consulting, Sioux Falls
This session provides a practical, application-focused overview of post-OBBBA estate planning strategies considering the increased basic exclusion amount (approximately $15 million). Examine how the expanded exemption creates new planning opportunities for both middle-wealth and high-net-worth clients, while also introducing long-term risks and policy considerations. Develop actionable planning techniques, including the use of trusts, lifetime gifting strategies, portability elections, and structures for closely held business owners. Special attention is given to balancing estate tax minimization with asset control and flexibility, as well as compliance considerations involving key IRS forms and elections. Leave with a structured framework for advising clients on estate planning decisions in 2026 and beyond, including how to adapt strategies in response to potential legislative changes.

Noon Lunch

1:00 p.m. AI and Regulatory Compliance
Jamie Schupp, Pohl & Associates, Dixon, IL
Just like in other areas of the banking industry, AI is being used increasingly in the compliance area. This session will talk about what does AI mean for risk and compliance for a trust organization. We'll also cover key policy and procedure updates necessary to address AI – the use of it, the prohibition against it, guardrails, limitations, etc. Finally, learn some real examples of where AI already being used in trust organizations and how it can help with your compliance and risk management.

2:00 p.m. Break with Exhibitors

2:20 p.m. Managing Clients with Special Needs Trust – Practical Strategies
Samantha Shepherd, JD, CEO, Assured Trust Co.
Serving clients with mental health challenges, drug addition, and other concerns requires both legal precision and practical sensitivity. This session offers guidance including effective communication, risk mitigation, balancing discretion with oversight, and coordinating care with families and other professionals. Shepherd will share her experiences to help practitioners provide effective, compassionate, and compliant service.

3:20 p.m. Break with Exhibitors

3:35 p.m. Iowa Medicaid Estate Recovery
Ben Chatman, Estate Recovery Program, Des Moines
Iowa's Estate Recovery law requires the state to be reimbursed from the estate of a person who has received benefits under certain Medicaid programs. This session will share how the program works and answer common questions such as who is subject to recovery, what Medicaid costs are included, waivers, and more. Ben will also address the recovery process and details on income trusts and special needs trusts.

4:35 p.m. Reception with Exhibitors

Friday, Oct. 23

8:00 a.m. Full Breakfast Buffet & Annual Meeting

8:45 a.m. Administering the Discretionary Trust
David Repp – Dickinson Bradshaw
This session will review what a discretionary trust is and how it compares to other types of trusts. Iowa specifics will be covered with trust code statute and examples from court cases. The session will also include abuse of discretion by definition and examples.

9:45 a.m. Break

10:00 a.m. The Change Equation – From Resistance to Results
Steve Richman
This engaging session covers something we all have to address – change. We'll cover the change acceptance process, lessons in leadership, effective communication throughout the process, and optimizing optimism during change. Steve draws on his success as a court-room litigation attorney, an account executive and business manager, negotiations and sales trainer, Six Sigma Black Belt, DJ and father.

11:15 a.m. Adjourn