

FINANCIAL INSTITUTIONS CONFERENCE

ISCPA
IOWA SOCIETY OF CPAs

8-8:10 a.m. | ISCPA update and welcome messages

Lindsey Haley | ISCPA Director of Membership and Business Development

*Michael Holdren, CPA | Committee Chair
Eide Bailly LLP*

Concord AB | Channel 1

8:10-9:10 a.m. | Navigating the Future of Banking: Industry Leader Perspectives

James Livingston | Federal Home Loan Bank of Des Moines

Adam Snodgrass | Iowa State Savings Bank

Heather Stumpf | GreenState Credit Union

Mitch Van Kley | Iowa Bankers Insurance and Services (moderator)

Concord AB | Channel 1

9:10-9:20 a.m. | Break

9:20-10:20 a.m. | Managing Through a Fed Easing Rate Cycle: Strategies to Consider Now & Common Mistakes to Avoid

Frank Farone

Darling Consulting Group

Concord AB | Channel 1

10:20- 10:30 a.m. | Break

10:30-11:25 a.m. | 2025 Tax Update for Financial Institutions

*Rachel Scheve, CPA and Kimberly Wernimont, CPA
RSM US LLP*

Concord AB | Channel 1

11:25 a.m.-12:10 p.m. | Lunch

Concord C

12:10-1:05 p.m. | Breakout sessions

Ethical Considerations for Generative AI in the Workplace

*Michael Bootsma, CPA, J.D., LL.M., CMA
Iowa State University*

Concord AB | Channel 1

Optimizing Core Processing for Cost Savings

*Doug Latare
ICI Consulting*

Salon A | Channel 2

1:05-1:15 p.m. | Break

1:15-2:10 p.m. | The Regulatory Landscape: Insights from Experts

Greg Goff | FDIC

Michael Holdren | Eide Bailly LLP (moderator)

Chris Kumpf | State of Iowa

Scott Saunders | Iowa Division of Banking

Concord AB | Channel 1

2:10-2:20 p.m. | Break

2:20-3:15 p.m. | Financial Institution Mergers and Acquisition Update

Blake Crow, CPA, MBT

Eide Bailly LLP

Concord AB | Channel 1

3:15-3:25 p.m. | Break

Reminder for in-person attendees: Sign the afternoon set of attendance sheets.

3:25-4:25 p.m. | Reacquiring Balance Sheets in a Post Pandemic Environment

Ryan Smith

Piper Sandler

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