

FINANCIAL INSTITUTIONS CONFERENCE

May 28 | West Des Moines Marriott | 8 hrs CPE

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 | ISCPA Financial Institutions Committee Chair | Eide Bailly LLP

8:10-9:10 a.m. | Economic Update

*Dr. Tom Root, Ph.D.
Drake University*

9:10-9:25 a.m. | Break

9:25-10:25 a.m. | 2026 Tax Update for Financial Institutions

*Rachel Scheve and Kimberly Wernimont
RSM US LLP*

10:25- 10:35 a.m. | Break

10:35-11:35 a.m. | AI in Banking: Industry Leader Perspectives

Derek Baker | Mills Marketing

Ben Currie | TruBank (Moderator)

Tim Dively | CLA

Shawn Laird | Federal Home Loan Bank of Des Moines

Eric Pulse | Eide Bailly

11:35 a.m.-12:20 p.m. | Lunch

Concord CD

12:20-1:20 p.m. | The Regulatory Landscape: Insights from Experts

James Johnson | Iowa Division of Banking

Chad Jorgensen | Federal Reserve Bank of Chicago

Chris Kumpf | Iowa Division of Credit Unions

David Redenbaugh | FDIC

Jenna Siberz | KPMG (Moderator)

1:20-1:30 p.m. | Break

1:30-2:20 p.m. | Ethical AI Practices: Ensuring Responsible Use

John Higgins

Higgins Advisory LLC

2:20-2:30 p.m. | Break

2:30-3:30 p.m. | Confessions of an Internal Auditor: What We're Really Seeing in the Field

Jamie Cornish | Federal Home Loan Bank of Des Moines

David Heneke | CLA

Michael Yung | West Bank (Moderator)

3:30-3:45 p.m. | Break

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

3:45-4:35 p.m. | Financial Institutions Fighting Fraud

Adam Gregg and Jenica Lensmeyer

Iowa Bankers Association