



Mid-Winter Management Conference

January 12-14

A scenic landscape photograph showing several tall palm trees in the foreground. In the background, there are rugged mountains with a mix of brown, tan, and blue tones, suggesting a desert or high-altitude environment. The sky is a clear, pale blue.

Hyatt Regency Indian Wells Resort & Spa

44600 Indian Wells Ln,
Indian Wells, CA 92210

Contact Maggie Klocke for more information at:

 mklocke@iowabankers.com

 515-286-4372

Conference Agenda

Sunday, January 12

5-8 p.m.

Welcome Reception & Shots in the Night

Indian Wells Golf Resort
All Attendees

Monday, January 13

8-11 a.m.

Business Meeting

Hyatt Regency Indian Wells Resort
Bankers Only

8-8:45 a.m. Welcome & Round Table

8:45-9:45 a.m. Session 1: Post Election Tax Law Update
Terry Merfeld, CPA, Eide Bailly

9:45-10:45 a.m. Session 2: Market Review of 2024...Looking to 2025
Aaron Stoffer, Country Club Bank Capital Markets Group

12 p.m.

Four-Person Best Shot Golf Tournament

Indian Wells Golf Resort
Noon shotgun start. \$235 per person
All Attendees — Additional charge

6:30-9 p.m.

Dinner

Hyatt Regency Indian Wells Resort
All Attendees

Tuesday, January 14

8-10 a.m.

Business Meeting

Hyatt Regency Indian Wells Resort
Bankers Only

8-9 a.m. Session 3: The Payments System
Terry Dooley, Executive Vice President & Chief Operating Officer, Shazam

9-10 a.m. Session 4: HR Hot Topics
Katie Fischer, IBA

Speaker Profiles



TERRY MERFELD, CPA: Terry has more than 29 years of experience in multiple areas of taxation, 25 years of them working directly with banks ranging in size from \$25 million in assets to over \$6 billion. He has performed extensive consulting and tax compliance services, with a focus on small and middle-market privately held businesses that are both C-Corporation and S-Corporation entities. He also assists with identifying the tax impact of transactions as clients consider their options in growing and transitioning their businesses for the future.



AARON STOFFER: Aaron Stoffer is an Investment Officer with the Capital Markets Group (CMG) of Country Club Bank as well as a Relationship Manager with Asset Management Group (CMG), a subsidiary of the bank. As an Investment Sales Officer, his primary responsibilities are portfolio sales and management for institutional clients. Aaron works with his clients to build sound balance sheet and liquidity strategies. He holds the following securities licenses: Series 52 MSRB Municipal Securities Registered Representative. His AMG clients enjoy direct access to Aaron's unique perspective and ideas. He guides them in the management of their balance sheets and has strong knowledge of current regulatory guidance as it pertains to asset liability management. Aaron spent four years with the State of Kansas as a state bank examiner. Prior to his time with the State of Kansas, he spent five years building a financial services business assisting his clients by addressing personal risk management and wealth-building strategies. This background affords him a thorough understanding of the challenging regulatory environment. When Aaron is away from the office, he enjoys spending time with his wife Christy, his two daughters Reagan and Renley, traveling, competitive BBQ contests, fishing, golfing, and rooting on his favorite sports teams.



TERRY DOOLEY: With more than 30 years of payment industry experience, Terry is an active participant in industry forums and publishes articles untangling the complexity of payment industry and explaining its challenges and impact on community financial institutions. He's an active participant and has served as chairman of the Secure Remote Payment Council, Payments Processing Information Sharing Council, and currently serves as chair of the Debit Network Alliance. He was also a member of the Federal Reserve Secure Payments Steering Committee. Terry is a leading voice for standards and the ability for community financial institutions to have choice and flexibility with equal access to the payments system.



KATIE FISCHER: Katie Fischer is the Vice President, Human Resources and Education for the Iowa Bankers Association. She has been with the association since 2013. As Vice President, Katie directs the Human Resources and Education functions for the IBA entities and manages HR support and consulting services for member banks. She maintains her SHRM, SP, SPHR and CAE certifications and received her Bachelor of Science in Psychology from Iowa State University. In addition, she is on the board for Central Iowa SHRM and the Iowa SHRM State Council.

Registration Form



January 12-14, 2025 • Indian Wells, California

*Name: _____
Spouse/Guest: _____
Children & ages: _____
*Bank: _____
*Mailing Address: _____
*City: _____ *State: _____ *ZIP: _____
*Arrival Date: _____
*Departure Date: _____
*Phone: _____
*Cell Phone: _____
*Email: _____

Costs

IBA Member: _____ @ \$595 = _____
Spouse/Guest: _____ @ \$395 = _____
Child (20 and under): _____ @ \$150 ea.= _____
Golf: _____ @ \$235 ea.= _____
Total: _____

Payment Choice (Check one)

____ Bill my institution
____ Check made payable to Iowa Bankers Association
____ Master Card
____ Visa
____ American Express

If paying by credit card, please complete the following:

*Card Number: _____ Exp. Date: _____ 3-digit Security Code: _____
*Card Holder Name: _____
*Card Billing Address: _____
*City: _____ *State: _____ *ZIP: _____
*Card Holder Signature: _____

**Required Information*

Making Your Reservations

Hotel Reservations — Special room rate is \$309 per night (Jan. 9-15). The room block cut-off date is Dec. 12, 2024. Reserve a room [online](#).

Golf Reservations — Golf registration is \$235 per person.

GOLF REGISTRATION

1. Name _____ \$235
E-mail _____
2. Name _____ \$235
E-mail _____

LIST YOUR FOURSOME HERE:

(Please note, listing individuals here does not automatically register them.)

1. _____
2. _____
3. _____
4. _____

Mail this form with payment to:

Attn: Maggie Klocke
Iowa Bankers Association
8901 Northpark Drive
Johnston, IA 50131

Registration Deadline:

December 12, 2024

Please contact Maggie Klocke with any additional questions at 515-286-4372 or by email at mklocke@iowabankers.com.