

JUNE 25-28, 2023

SUN VALLEY, IDAHO

115TH ANNUAL

**UBA
CONVENTION**

WWW.UTAH.BANK/CONVENTION

SPEAKERS



Dave DeFazio - Partner - StrategyCorps

Armed with a passion for banking strategy, StrategyCorps partner Dave DeFazio has found great success and satisfaction in exploring the intersection of data, marketing, and technology. Dave's extensive financial services experience and continuous research in the field help him ensure that each product and service meets the needs of today's financial institutions.



Dan Meers - Mascot - Kansas City Chiefs

Dan Meers has been KC Wolf, the mascot of the Kansas City Chiefs, for more than 25 years. In 2006 he was selected as the first NFL mascot inducted into the Mascot Hall of Fame. Dan travels throughout the United States and the world entertaining thousands of people both in and out of costume. He has performed in over 30 states and six different countries.



Rob Morgan - Chief Executive Officer - USDF Consortium

Rob Morgan is the chief executive officer of the USDF Consortium, a network of banks built to further the adoption and interoperability of a bank-minted tokenized deposit. Morgan joined USDF in June 2022 at a time when lawmakers and regulators have been focused on building new regulatory frameworks for digital assets.



JP Nichols - Managing Director - Alloy Labs Institute

JP is Managing Director of the Alloy Labs Institute, which includes industry-leading corporate and executive growth programs. He works directly with bank leadership teams and boards to help them build and leverage their internal innovation capacity to "unbreak the bank", unleash new growth potential, and quickly forge ideas into results.



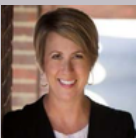
Jake Oubina - Senior U.S. Economist - Piper Sandler

Jake Oubina is a senior U.S. economist on the economics research team at Piper Sandler. Oubina specializes in broadening and deepening the economics research team's coverage, working on micro to macro, thematic research and more. Prior to joining the firm, he served as a director and senior U.S. economist at RBC Capital Markets for over 10 years.



Dan Robb - President & CEO - Jonesburg State Bank, ABA Chair

Dan Robb is president and CEO of Jonesburg State Bank, a 100-year-old, community bank in East Central Missouri. Robb has over 37 years of banking experience since starting his career in 1985 as a bank teller. Dan is active in the local communities, serving on various business and non-profit boards, and he is involved in multiple civic activity groups.



Susan Rogers - Partner - People Pinnacle, LLC

Susan Rogers has over twenty-five years of experience as a management consultant, organizational change expert and HR professional. She specializes in facilitating strategy and organizational design, developing and coaching leaders, and managing the "people" side of organizational change initiatives.



Joe Sullivan - CEO and Founder - Market Insights, Inc.

Joe Sullivan found Marketing Insights to help bring clarity to the complex choices faced by community-based financial institutions by providing market-specific, data-driven insights and strategies that will position their institutions for sustainable growth. The themes of growth, innovation and motivation can be found throughout Joe's 30+ years of work.



Joan Woodward - President - The Travelers Institute

Joan Woodward joined Travelers in 2008 from Goldman Sachs to establish The Travelers Institute as the company's thought leadership and public policy platform. Prior to joining Goldman, Woodward worked as Deputy Chief of Staff for U.S. Senate Finance Committee Chairman Bill Roth, where she was instrumental in creating the Roth IRA.

ACTIVITIES

Bingo - Monday, June 26

4:00 - 5:30pm

Limelight Ballroom

The ever popular Sun Valley bingo game is open to all convention registrants and their families, no charge or registration needed.

Fun Run - Tuesday, June 27

6:30am

Dollar Bus Loop

The 5K Run or 1.5K Walk includes prizes, refreshments, and a t-shirt for all participants.

Golf Tournament - Tuesday, June 27

7:30am - 2:00pm

SV Golf Course

Scramble format open to all levels of golfers, includes continental breakfast, tournament, BBQ lunch, refreshments, and prizes. Pre-registration required.

River Run - Tuesday, June 27

8:15am - 4:00pm

Baldy Bus Loop

Price includes breakfast, transportation, rafting trip, and lunch. Wear clothes and shoes that you don't mind getting wet, and bring a change of clothes for the ride home. Pre-registration required. Minimum age is 6.

Pickleball Tournament - Tuesday, June 27

2:30 - 4:00 pm

SV Tennis Courts

Round robin format, includes paddles, balls, t-shirt, refreshments, and prizes. Minimum age is 12.

Trap Shoot - Monday, June 26 & Tuesday, June 27

SV Gun Club

Includes gun rental, targets, ammunition for 25 shots, prizes and gratuities. You must pre-register to participate and sign up for a specific appointment time. Appointments are assigned on a first come, first served basis. Check at registration for final appointment time. You must be at least 12 years old to shoot.

Horseback Trail Rides - Monday, June 26 & Tuesday, June 27

SV Stables

Price includes 1-hour trail ride and gratuity. You must pre-register to participate and sign-up for a specific appointment time. Appointments are assigned on a first come, first served basis. Check at registration for final appointment time. Minimum age is 9, and minimum height is 52". Children under 15 must be accompanied by a parent.

	<u>By 5/26</u>	<u>After 5/26</u>
Fun Run	\$25	\$30
Golf	\$250	\$270
River Run	\$180	\$200
Pickleball	\$70	\$80
Trap Shoot	\$95	\$105
Trail Ride	\$90	\$100

Important Activities Information

To accommodate our large group, we are requiring pre-registration for activities. To make sure you are able to participate in the activities of your choice, we encourage you to register by May 26. Fees will increase after May 26. If we have not reached capacity, you may sign up for an activity after May 26, or onsite in Sun Valley based on availability. Call the UBA office 801-364-4303 if you have any questions or want to add activities after May 26.

SCHEDULE AT A GLANCE

SUNDAY, JUNE 25

2:00 - 5:00 pm **Exhibit Hall & Registration**
Limelight Ballroom

6:30 - 8:30 pm **Welcome Reception, Buffet & Entertainment**
Trail Creek Campground

MONDAY, JUNE 26

7:30 - 9:30 am **Exhibit Hall, Registration & Breakfast**
Breakfast open until 9:00am
Limelight Ballroom

9:30 - 11:30 am **Opening Business Session**
Continental Room

"Navigating the Coming Demographic Crisis"
Joe Sullivan, CEO & Founder, Market Insights

"The Future of Banking"
JP Nichols, Managing Director, Alloy Lab Institute

11:30 am - 1:30 pm **Networking & Vendor Lunch**
Vendor Recognition & Prize Drawings
Lodge Terrace

1:45 - 2:35 pm **Breakout Sessions**

- **"Digital Currency / Blockchain"**
Rob Morgan, CEO, USDF Consortium
- **"Creating a Culture of Engagement"**
Susan Rogers, Partner, People Pinnacle, LLC

2:40 - 3:30 pm **Breakout Sessions**

- **"Interest Rate Risk"**
Jake Oubina, Senior U.S. Economist, Piper Sandler
- **TBA**

4:00 - 5:30 pm **Bingo**
Limelight Ballroom

Evening **Dinner on Your Own**

9:00 pm **President's Club Reception**
(By invitation only)
Harriman Cabin

TUESDAY, JUNE 27

6:30 am **5k Fun Run/Walk**

7:30 am - 2:00 pm **Golf Tournament**

8:15 am - 4:00 pm **White Water Rafting Trip**

2:30 - 4:00 pm **Pickleball Tournament**

7:00 - 9:00 pm **Chairman's Reception & Dinner**

9:00 pm **Entertainment**
Comedian Ryan Hamilton
Limelight Ballroom



WEDNESDAY, JUNE 28

7:30 am **UBA CEO & Past Chairman's Breakfast**
(By invitation only)
Limelight B

9:00 - 10:25 am **Business Session**
Continental Room

"ABA Report"
Dan Robb, President & CEO, Jonesburg State Bank, ABA Chair

"Woodward on Washington: An Economic, Policy and Political Outlook"
Joan Woodward, President, The Travelers Institute

"Close Encounters of the Fintech Kind"
Dave DeFazio, Partner, StrategyCorps

Annual UBA Membership Meeting

10:25 - 10:40 am **Refreshment Break**

10:40 am - 12:00 pm **Business Session**
Continental Room

"Courageous Leadership – Living a Life of Influence"
Dan Meers, Mascot, Kansas City Chiefs

Closing Comments & Prize Drawings

12:00 pm **Convention Adjourns**

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Utah Housing Preservation Fund
Zions Correspondent Banking Group

REGISTRATION & HOTEL INFORMATION

Register online @ www.utah.bank/convention

Registration Fees

A full registration includes all business sessions, meals, exhibit hall, the chairman's reception, dinner and entertainment. All other activities are in addition to registration fees.

Type	By 5/26	After 5/26
Convention Registration - Couple	\$1,175	\$1,225
Convention Registration - Single	\$925	\$975

Registration includes business sessions, exhibit hall, meals, entertainment and bingo. Additional meal tickets for non-registered guests and activity registrations may be purchased separately.

Registration Deadline

To receive early bird pricing, registrations must be received by May 26, 2023. All registrations received by that date will be entered into a pre-registration prize drawing for two nights lodging plus activities for two at Sun Valley.

Cancellation Policy

- A full registration refund less \$50 will be made if written notice is received on or before May 26, 2023. A \$150 administrative fee per registrant will be assessed if written notice is received after May 26, 2023.
- There will be no refunds for registration or activity cancellations received after June 9, 2023.
- Substitutions are allowed at any time.

Sun Valley Resort

1 Sun Valley Road, Sun Valley, Idaho 83353

Since 1936, the Sun Valley Lodge has welcomed visitors with elegant amenities and old world charm. From cozy cottages to three-bedroom condominiums, you'll find it all in Sun Valley. The centric arrangement of the Village puts shopping, entertainment and dining just a short stroll from your door, and three outdoor heated pools and a shimmering lake allow you to float the day away. The line between work and play surely gets a little blurry at Sun Valley.

Reservations

A block of rooms in the Sun Valley Lodge and Inn, as well as a variety of condos and cottages, have been reserved for your stay. Make your hotel reservations online using this link: <https://reservations.travelclick.com/73132?groupID=3543152>

If you need additional assistance, call Sun Valley Reservations at 800.786.8259. The room block expires May 26, 2023.

Sun Valley Travel

Sun Valley is served by Hailey's Friedman Memorial Airport (SUN), located 14 miles from the resort.