



116th Annual UBA CONVENTION

JUNE 23-26, 2024
SUN VALLEY, IDAHO

UTAH.BANK/CONVENTION

Speakers

Activities



Linda Clemons – *Global Sales & Nonverbal Communications Expert*

Linda Clemons is an award-winning, record-setting sales producer, and one of the top sales trainers in the world. Linda is a Body Language Expert trained and certified in Analytic Interviewing and Statement Analysis™, a process used to detect deception.



James Olson – *Former CIA Chief of Counterintelligence*

Imagine living a lie for 31 years. That's what James Olson and his wife Meredith did while spying for the CIA. Spying for his country was the furthest thing from his mind when Olson, a farm boy from Iowa, received a mysterious phone call that changed his life forever. In his presentation, Olson takes you inside the real world of being a CIA spy.



Wil Osborn – *Chief Business Officer – FHLB of Des Moines*

Wil Osborn is the chief business officer of the Federal Home Loan Bank of Des Moines. He joined the Bank in 2020 and has responsibility for the Bank's member-facing departments including community investment, funding product group, marketing communications, member experience, member relationships and solutions and the mortgage product group.



Ted Paulsen – *CEO – Lecticon and VEST EAP*

Ted is CEO of Lecticon and VEST EAP, providing clients such as Salt Lake County, Larry Miller Group, AAA Insurance, Safety National Insurance, and many first responder agencies with comprehensive cultural enhancement and employee retention solutions.



Darryle Rude – *Commissioner – Utah Department of Financial Institutions*

Darryle was appointed Commissioner in June 2022. In his 34 years with the Department, he has received a comprehensive education in financial institution regulation through partnerships and training with the FDIC, NCUA, Federal Reserve Bank, and others.



Robert Spendlove – *Economic & Public Policy Officer – Zions Bank*

Robert is a Senior Vice President and the Economic and Public Policy Officer for Zions Bank. In this capacity he monitors and reports on economic indicators and public policy developments for the bank.



Julieann Thurlow – *President & CEO – Reading Cooperative Bank, ABA Chair*

Julieann is President & CEO at Reading Cooperative Bank. *American Banker* has repeatedly named her to its Top 25 Women to Watch in Banking and the Commonwealth Institute has named Reading Cooperative Bank a Top 100 Women-Led Business for 6 years running.



Derek White – *CEO – Galileo Financial Technologies*

Derek has been a pioneer in digital banking and financial technologies for more than two-decades. Prior to joining Galileo, Derek was VP of Global Financial Services at Google Cloud, partnering with banks, insurance companies, and fintechs to redefine their core business units and transition to leading-edge, digital-first operations.

Bingo – Monday, June 24

4:00 – 5:30pm

Limelight Ballroom

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

Fun Run – Tuesday, June 25

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 25

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.

NEW! UTV Off-Road Ride – Tuesday, June 25

8:00am – 12:00pm OR 12:30 – 4:30pm

Ryan's Mountain Rentals

Explore Idaho's breathtaking backcountry on a half day UTV Off-Road Ride., with options to rent a machine or bring your own. Must be 18 to drive rented UTVs.

River Run – Tuesday, June 25

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 25

2:30 – 4:00pm

SV Tennis Courts

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

Trap Shoot – Monday, June 24 & Tuesday, June 25

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 24 & Tuesday, June 25

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 5'2". Children under 15 must be accompanied by a parent.

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 24. Fees will increase after May 24. If we have not reached capacity, you may sign up for an activity after May 24, 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 24.

	<u>By 5/24</u>	<u>After 5/24</u>
Fun Run	\$30	\$35
Golf	\$270	\$290
UTV Ride (w/rental)	\$120	\$140
UTV Ride (BYO)	\$35	\$45
River Run	\$190	\$210
Pickleball	\$95	\$105
Trap Shoot	\$130	\$140
Trail Ride	\$120	\$130

Schedule at a Glance

SUNDAY, JUNE 23

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

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

MONDAY, JUNE 24

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

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

- **“The Silent Language of Leaders”**
 - **Linda Clemons**, Global Sales & Nonverbal Communications Expert
- **“Digital Innovation”**
 - **Derek White**, CEO, Galileo Financial Technologies
- **“Rapid Fire Election Forecast”**

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

1:45 – 2:35pm **Breakout Sessions**

- **“FHLBank System at 100: Focusing on the Future”**
 - **Wil Osborn**, Chief Business Officer, Federal Home Loan Bank of Des Moines
- **“Keys to Engaging, Motivating, and Retaining Team Members through Self-Determined Behavior and Resilience Strategies”**
 - **Ted Paulsen**, CEO, Lecticon and VEST EAP

2:40 – 3:30pm **Breakout Sessions**

- **“Industry Hot Topics Roundtable with Commissioner Rude”**
 - **Commissioner Darryle Rude & Team**
- **“Generative AI in Banking: Opportunities & Challenges”**
 - Speaker TBA

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

Evening **Dinner on Your Own**

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

TUESDAY, JUNE 25

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

7:30am – 2:00pm **Golf Tournament**

8:00am – 12:00pm **Morning UTV Off-Road Ride**

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

12:30pm – 4:30pm **Afternoon UTV Off-Road Ride**

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

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

9:15pm **Entertainment**
Liverpool Legends
Sun Valley Pavilion



WEDNESDAY, JUNE 26

7:00am **UBA CEO & Past Chairman's Breakfast**
(By invitation only)
Limelight B

8:30 – 10:10am **Business Session**
Continental Room

- **“ABA Report”**
 - **Julieann Thurlow**, ABA Chair
- **“Economic Outlook”**
 - **Robert Spendlove**, Economic & Public Policy Officer, Zions Bank
- **“Emerging Bank Leaders Report”**
 - **Tyson Broderick**, VP, Director of Loan Operations, CCBank
- **“State of the UBA”**
 - **Howard Headlee**, President, UBA

10:10 – 10:20am **Refreshment Break**

10:20am – 12:00pm **Business Session**
Continental Room

- **Annual UBA Membership Meeting**
- **“A Different Kind of Career: Undercover in the CIA”**
 - **James Olson**, Former CIA Chief of Counterintelligence
- **Closing Comments & Prize Drawings**

12:00pm **Convention Adjourns**

Marquis Sponsor

ZIONS BANK. | Correspondent Banking

Diamond Sponsors



P E L I O N

Platinum Sponsors



Gold Sponsors



REGISTRATION & HOTEL INFORMATION

Register online @ www.utah.bank/convention

Registration Fees

A full registration includes all business sessions, meals, exhibit hall, entertainment, and Bingo. All other activities are in addition to registration fee. Additional meal and/or event tickets may be purchased for non-registered guests.

Type	By 5/24	After 5/24
Convention Registration - Couple	\$1,285	\$1,335
Convention Registration - Single	\$995	\$1,045

Additional Meal / Event Tickets	By 5/24	After 5/24
Sunday Dinner	\$140	\$150
Monday Lunch	\$60	\$65
Tuesday Dinner	\$140	\$150
Liverpool Legends Concert - individual	\$10	\$10
Liverpool Legends Family Pass (5 tickets)*	\$25	\$25

*Additional tickets are \$5 each

Registration Deadline

To receive early bird pricing, registrations must be received by May 24, 2024. 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 24, 2024. A \$150 administrative fee per registrant will be assessed if written notice is received after May 24, 2024.
- There will be no refunds for registration or activity cancellations received after June 7, 2024.
- Substitutions are allowed at any time.

Golf Hole Sponsors

- B:Side Capital
- EVO Asset Consulting
- Experian
- Mountain West Small Business Finance
- Small Business Financial Exchange

Exhibitors

- ADVANTAGE, powered by JMFA
- Allied Solutions
- Apiture
- Bankers' Bank of the West
- BHG Financial
- BMA
- B:Side Capital
- CoFi
- Commercial Funding Partners, LLC
- Compliance Alliance
- Cook Solutions Group
- Cornerstone Advisors
- Dash Billing
- Direct Credit Funding
- Dorsey & Whitney LLP
- Everon (previously ADT Commercial)
- EVO Asset Consulting
- Executech
- FPS GOLD
- InterMountain Business Lending
- IntraFi Network
- isolved
- Moss Adams
- Mountain West Small Business Finance
- Parsons Behle & Latimer
- PCBB
- PCBS
- Pelion Venture Partners
- ProFi
- Q2
- Raisin
- Rocky Mountain CRC
- RSM
- Security Home Mortgage
- Select Bankcard
- Utah Housing Preservation Fund
- Zions Correspondent Banking Group

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=3576347>

Or you can call Sun Valley Reservations at 800.786.8259. The room block expires May 24, 2024.

Sun Valley Travel

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