2022 Banker Summit
May 4-6, 2022
The Broadmoor | Colorado Springs
RESTAURANTS
1. PLAY Bowling Alley at The Broadmoor
2. Ristorante del Lago & Bar
3. Natural Epicurean
4. The Lake Terrace Pool Café
5. Summit
6. Golden Bee
7. The Grille
8. Hotel Bar
9. Lake Terrace Dining Room
10. Café Julie’s
11. La Taverne

SHOPS & GALLERIES
A-B. Peter Millar Shop
C. The Broadmoor Jewelry Company
D. The Great Republic
E. The Boutique at The Broadmoor
F. Yarid’s Shoes
G. The Broadmoor Western and Wildlife Gallery
H. Signature Shop
I. Strata
J. Gibson’s Mineral Gallery
K. The Broadmoor Traditional Gallery
L. Rutledge’s
M. Base Camp
N. Fitness Shop
O. The Broadmoor Golf Shop
P. Salon Shop
Q. The Broadmoor Tennis Shop
R. The Broadmoor Shop

CONFERENCE ROOMS
1. Broadmoor Main
2. Spa, Golf, and Tennis Complex
3. Broadmoor South
4. Broadmoor West
5. Cheyenne Lodge/Mountain Clubhouse
6. Broadmoor Hall
7. International Center
8. Colorado Hall
9. The Fish House
10. The Broadmoor Estate House
11. Bartolin Hall
BANKERS, WANT TO WIN $1,000?

Here’s the scoop: To be entered for the chance to win $1,000 simply visit each of the exhibitors’ booths and have them stamp your playing card. Once all of the spaces have been stamped, return your completed card to a CBA or AzBA staff member to be entered into the drawing.

The drawing will occur on Friday, May 6 after lunch. This gives you ample time to collect all stamps needed. Please see CBA or AzBA staff if you have any questions. *This drawing is open to bankers ONLY*

WIFI

Network: Broadmoor Meeting
Password: CBA21
WIFI is generously sponsored by:

QR code to website

All conference materials can be accessed digitally by scanning the QR code below.

This code is generously sponsored by:

2022 Banker Summit | Resources
**Wednesday, May 4**

3:30-9:00 p.m. — Early arrival and dinner on your own

**Thursday, May 5 | Colorado Hall**

7:00-8:30 a.m. — Conference Registration

8:00-8:30 a.m. — Continental Breakfast / Registration

8:30-8:45 a.m. — Welcome Remarks

   Jenifer Waller — President/CEO, Colorado Bankers Association

8:45-9:15 a.m. — ABA Washington Update

   Rob Nichols — President/CEO, American Bankers Association

9:15-9:30 a.m. — Break

9:30-10:30 a.m. — State Government Relations Update

   Alison Morgan — Director of State Government Relations, Colorado Bankers Association
   Paul Hickman — President/CEO, Arizona Bankers Association
   Moderated by: Jenifer Waller — President/CEO, Colorado Bankers Association

10:30-11:30 a.m. — Merger & Acquisition Panel

   Adam Keefer — Managing Director, Financial Services Investment Banking, Piper Sandler
   Andrew Underwood — Managing Director, PNC FIG Advisory, PNC Bank
   Brian Palmer — President, Olsen Palmer
   Selena Samale — Of Counsel, Stinson
   Moderated by: Chris Hill — Senior Vice President & Chief Financial Officer, Bankers’ Bank of the West
11:30 a.m.-1:00 p.m. — Lunch / Exhibit Hall

FHLBank
San Francisco

1:00-2:00 p.m. — Crypto 101

Patti Wubbels — Senior Vice President-Client Development, Strategic Resource Management

2:00-2:15 p.m. — Break

2:15-3:15 p.m. — How to Recruit and Retain Talent through the Great Resignation

Erica Brune — President, Lever 1

3:15-3:30 p.m. — Break

3:30-4:30 p.m. — Cybersecurity Threats and Outlook

Cerone “Cy” Sturdivant — Director, BKD

4:30-5:00 p.m. — Center for Bank Advocacy Graduation

5:00-7:30 p.m. — Welcome/Graduation Reception @ Mountain View Terrace

Directions to Mountain View Terrace (#9 on the map)

Go to the main building (front doors), up the escalator and out the glass doors to the lake. Take the pathway between the two lakes to the West building. Enter the building and follow the signage that leads you through the second hallway on your right to the glass door that takes you to the terrace (on the left).

Friday, May 6 | Colorado Hall

7:00-7:30 a.m. — Wellness Walk (meet on bridge/pathway between the two lakes)

Ballard Spahr LLP

8:00-9:30 a.m. — Breakfast

8:00-9:30 a.m. — Arizona Bankers Annual Membership Meeting (AZ Bankers only)

Meet in conference area F in Colorado Hall

8:30-9:30 a.m. — Colorado Bankers Annual Membership Meeting (CO Bankers only)

Meet in main conference area in Colorado Hall
9:30-9:45 a.m. — Break

9:45-10:45 a.m. — Update from the Federal Reserve Bank
   Esther George — President, Federal Reserve Bank of Kansas City

10:45-11:45 a.m. — Put the Gloves on! Leveraging Customer Data to Maximize NII
   Matt Mingenback — President, Fitech by Deluxe

11:45 a.m.-1:00 p.m. — Lunch / Exhibit Hall

1:00-2:00 p.m. — FinTech
   Jim Reuter — CEO, FirstBank

2:00-2:15 p.m. — Break

2:15-3:15 p.m. — Banker Panel: Hot Issues
   Bo Hughes — President/CEO, Canyon Community Bank
   Ed Francis — President/CEO, InBank
   Koger Propst — President/CEO, ANB Bank
   Kyle Kennedy — President-Phoenix/Arizona Banking Director, Bell Bank
   Moderated by: Paul Hickman — President/CEO, Arizona Bankers Association

3:15-3:30 p.m. — Break

3:30-4:30 p.m. — The Coolest Tools To Move From Stressed To Blessed
   Dr. James Rouse — Integrative Functional Medicine Clinician

4:30-5:00 p.m. — Farewell Remarks from Don Childears
   Don Childears — Former President/CEO, Colorado Bankers Association

5:00-5:30 p.m. — Break

5:30-9:00 p.m. — Retirement Reception for Don Childears at
   International Center
You’re invited!

Retirement Party
honoring
Don Childears

We welcome you to join us for a reception to honor Don Childears’ 47 years at Colorado Bankers Association.

This event is generously sponsored by

Friday, May 6 | 5:30 p.m.
International Center at Broadmoor Hotel

Live music by the band WINK!

Thank you, Don, for your dedication to the banking industry!
REPRESENTING FINANCIAL INSTITUTIONS NATIONWIDE SINCE 1903

We combine our financial institutions experience with other legal disciplines including securities, tax, employment, real estate, environmental law, and litigation, to create effective solutions for our clients.

Karen L. Witt
Partner
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Lewis Roca Rothgerber Christie LLP
This material has been prepared for general advertising pur
Adam Keefer

Adam Keefer is a Managing Director in the financial services group at Piper Sandler. Previously, he was a managing director in the investment banking group of Sandler O’Neill + Partners, L.P. Since joining the firm in 2004, Keefer focused on financial institutions in the western region. He has extensive experience serving as an advisor in mergers and acquisitions, public and private capital raising transactions, recapitalizations, restructurings and other strategic initiatives for Sandler O’Neill’s clients, including the $2B merger between Umpqua Holdings Corp. and Sterling Financial Corp., Pacific Capital Bancorp’s $1.5B sale to Mitsubishi UFJ Financial Group, Inc. and Washington Banking Company’s $265M strategic merger with Heritage Financial Corp. Prior to joining Sandler O’Neill, Keefer served as an investment banking analyst for D.A. Davidson & Co.

Alison Morgan

Alison Morgan is the Director of State Government Relations at Colorado Bankers Association. She is a dedicated professional with extensive experience in state and local government relations and advocacy. She is passionate about banking and promoting issues important to the industry and Colorado. Alison comes to the CBA after a 22-year career in state government with roles in advocacy, communications, and management. Prior to moving to Colorado in 1998, Alison was development director in numerous political and issues campaigns. Alison has a Bachelor of Science in Business Administration with a concentration in finance and marketing.

Andrew Underwood

Andrew Underwood is a Managing Director in PNC FIG Advisory and is responsible for M&A advisory, capital markets, portfolio strategy and balance sheet management. Prior to joining PNC in 2021, Mr. Underwood was a managing director at Barclays, a global investment bank. At Barclays, he led the mid-sized bank coverage effort in the Financial Institutions Group. Mr. Underwood joined Barclays in 2008 from Lehman Brothers in New York. In 2011, he was tapped to develop a regional bank coverage practice from Barclay’s office in Atlanta, which grew to cover dozens of banks located throughout the U.S., ranging in size from community banks to super-regionals. Before joining Lehman Brothers, Mr. Underwood was a portfolio adviser at FTN Financial in Memphis, one of the largest investment banks serving the banks in the U.S. At FTN, he advised clients regarding portfolio strategy and capital management and managed over $1.6 billion in securities for clients. His experience at FTN includes investing in a wide variety of securities including structured mortgage-backed securities, municipal bonds, agency securities and cash management instruments.
Bo Hughes

Bodil (Bo) Hughes is the President and Chief Executive Officer at Canyon Community Bank. She leads the banking team and is responsible for the overall growth of the bank. Prior to joining Canyon, she was President & COO of Pinnacle Bank in Scottsdale, Arizona until the bank was sold to Arizona Federal Credit Union in 2019. Ms. Hughes has been an active member of the Arizona banking community since 2008 and recently joined Canyon in June 2021.

Brian Palmer

Brian Palmer is co-founder and President of Olsen Palmer LLC, an independent investment banking firm that exclusively advises community banks across the full spectrum of mergers & acquisitions. Mr. Palmer leads Olsen Palmer’s practice in the western U.S. out of the firm’s office in Centennial, Colorado. Before founding Olsen Palmer, Mr. Palmer served with Bank of America as a Vice President of Corporate Strategy and was a management consultant and M&A advisor to financial institutions and fintech companies with First Annapolis Consulting (now part of Accenture). Mr. Palmer earned a Master of Science in Finance from the University of Colorado and a Bachelor of Science in Finance from the University of Maryland.

Cerone “Cy” Sturdivant

Cy is a member of BKDcyber and has more than 17 years of experience working with and serving clients across various industries. He primarily focuses on performing IT general control engagements, Cybersecurity assessments, Internal Audit SOX engagements and manages various other cybersecurity-related services for clients across the Firm. Before joining BKD, he worked for a community bank in their risk management division and other accounting firms specializing in Information Security related internal audits and IT Control Assessments. Cy has been a practicing Certified Information Systems Auditor (CISA) since 2009. His professional memberships include ISACA®, Tennessee Bankers Association Strategic Technology Steering Committee and InfraGard Middle Tennessee Members Alliance.

Chris Hill

Chris Hill is the Chief Financial Officer for Bankers’ Bank of the West and oversees financial reporting, liquidity and funding, and audit and compliance for BBW and its affiliates. Chris launched his community banking career after college, gaining experience in credit, lending, and bank information technology. Today he serves on the boards of directors for the Young Americans Education Foundation and Young Americans Bank, and is actively involved with the U.S. Coin Task Force and the ABA’s correspondent bank working group and Risk Management School advisory board. Chris has a bachelor’s degree in finance from Colorado State University and master’s degree in business administration from the University of Colorado; in addition, he completed the Graduate School of Banking at Colorado and the ABA Advanced Risk Management programs.
Ed Francis

Ed has over 30 years of banking and financial institution experience and is Chairman of the Board, President and Chief Executive Officer for InBankshares and InBank. Previously, he held the position of Executive Vice President and Chief Banking Officer at Hancock Whitney and led both retail and commercial banking divisions. Ed also served on Hancock Whitney’s Executive Management Committee for more than 10 years as assets grew from $5 billion to over $25 billion. He holds a B.S. in Managerial Finance from the University of Mississippi and matriculated from the Graduate School of Banking at LSU. Ed also serves on the board for Firefly Autism in Denver.

Erica Brune

Erica Brune is President of Lever1, a Kansas City-based professional employer organization (PEO) providing human resources, payroll and employee benefit solutions. Within five years of launching Lever1, Erica helped drive the company to become Missouri’s Fastest Growing Company of 2017—ranked No. 44 in the nation by Inc. Magazine. With Erica’s guidance, Lever1 has secured an industry-wide reputation of excellence, operational reliability and thought leadership.

President Esther George

Esther George took office on October 1, 2011, as the ninth President and Chief Executive Officer of the 10th District, Federal Reserve Bank of Kansas City. In 2021, she served as an alternate voting member of the Federal Open Market Committee. Ms. George joined the Federal Reserve Bank of Kansas City in 1982 and served much of her career in the Division of Supervision and Risk Management. She began as a commissioned bank examiner and eventually served for 10 years as the District's chief regulator. In that capacity, she was responsible for oversight of the District’s state-chartered member banks and nearly 1,000 bank and financial holding companies as well as the Bank's discount window and risk management functions. She was directly involved in the Tenth District's banking supervision and discount window lending activities during the banking crisis of the 1980s and post-9/11. She is a former chair of the Federal Reserve System's Community Banking Organizations Management Group. Ms. George also served as the acting director of the Division of Supervision and Regulation at the Board of Governors of the Federal Reserve System in Washington, D.C. during the recent financial crisis.
Dr. James Rouse

Dr. James Rouse is a highly authentic, energized, and purpose-driven leader. As a naturopathic doctor, entrepreneur, athlete, husband and father, Dr. James has personal, clinical and professional understanding of what it takes to create and sustain a life we love. From Fortune 50 boardrooms to nationally broadcast media, Dr. James has served and inspired seasoned billionaires, world class athletes and budding entrepreneurs. James brings his love for human potential and his passion for serving to curate high performing cultures from start-ups to multinational corporations. James is a teacher of "what works" that allows both environments to thrive. His enthusiasm for helping us all to realize our potential is contagious and his commitment to showing us how to have success in our whole life is unsurpassed.

Jenifer Waller

Jenifer Waller was promoted to Chief Executive Officer and President of Colorado Bankers Association in January 2022 after serving as President since 2020. Waller joined CBA in 1999 as the Senior Vice President responsible for state government relations and banking advocacy. In 2016, she was promoted to Chief Operating Officer accountable for the daily operations and management of the association. Prior to her days at CBA, Waller spent almost five years as a bank examiner for the Colorado Division of Banking. Waller gives back to the community through her participation in numerous civic and educational programs including trustee for Graduate School of Banking - Colorado and Madison, board member for Colorado Civil Justice League, Compliance Alliance, and Common Sense Institute. Waller enjoys politics and volunteering for campaigns.

Jim Reuter

Jim Reuter is Chief Executive Officer (CEO) of FirstBank. Reuter has extensive banking experience, starting his career at FirstBank in 1987 and holding several different roles within the organization. He previously served as FirstBank’s Chief Operating Officer (COO) where he oversaw many of the bank’s divisions, including: loan/mortgage operations, IT, online banking, payments, contact center, online account/loan acquisition, and treasury management. FirstBank has attributed many of the bank’s products and IT innovations over the years to Reuter’s leadership and guidance. Prior to his roles in operations and IT, Reuter served as a loan officer in FirstBank’s Palm Desert location. Industry involvement includes work with the American Bankers Association, The Clearing House and Midsize Bank Coalition. Reuter is also a highly active member of the community including American Cancer Society of Colorado CEOs Against Cancer, Women’s Foundation of Colorado, Special Olympics of Colorado, Blind Institute of Technology, and Cerebral Palsy of Colorado Legacy Foundation.
Koger Propst

As president and CEO of ANB Bank and the Sturm Financial Group, Koger Propst brings more than 35 years of experience in community banking with a focus on creating alignments that allow the bank, its employees and its customers to achieve mutual goals. He leads ANB Bank with a firm belief in the power of independent banking and its ability to enhance lives and communities. For ANB’s customers, that means consumer and business solutions crafted to deliver personalized service and products.

A Colorado native, Koger earned his bachelor’s in business administration from the University of Denver and continued his education at the Graduate School of Banking in Madison, Wisconsin.

Kyle Kennedy

Kyle Kennedy brings nearly 3 decades of experience in the Arizona banking community to his position at Bell, where he is working to grow our bank’s presence in the Southwest as the President—Phoenix/Arizona Banking Director. During his career, he’s specialized in the areas of commercial and industrial lending, treasury management, small business banking and private banking.

Bell Bank offers big bank services with a definite community bank feel. When you have a great culture at the core, your business can stay solid through economic cycles.

Kyle is a lifelong Arizonan and a graduate of the University of Arizona, as well as the Pacific Coast Banking School at the University of Washington. Outside of work, he stays involved in the community and has served on the boards of the Tempe YMCA, Chrysalis, Peoria Diamond Club and Trout Camp (New Pathways for Youth) and chaired the CoBiz Financial BizBash.

Matt Mingenback

Matt Mingenback is a sales veteran with a proven track record of helping customers build both lasting and profitable relationships. He joined the Fitech team in 2017, switching gears from health care staffing and recruiting to focus exclusively on the needs of community banks. Today, he leads a team that’s helping 130 banks—and counting—across the country to grow their non-interest income through payment technology.

The Kansas State University alum began riding unicycles as a child and applies the concept “moving forward, regardless of how unbalanced a situation may seem” from his unicycle lessons to both his life and career.
Patti Wubbels

Patti Wubbels is Senior Vice President of Client Development and lead for the cryptocurrency advisory services at SRM (Strategic Resource Management), an independent firm that advises financial institutions in executing business strategies and strategic sourcing initiatives. At SRM, Wubbels is passionate about helping clients with strategies around cost savings, revenue opportunities, and process efficiencies. More recently, Patti helped to launch SRM’s crypto advisory, delivering education and strategic planning services for financial institutions integrating cryptocurrency and blockchain concepts and technology.

Wubbels has over 20 years of business development experience, with 16+ years in the banking industry. Prior to joining SRM, Wubbels spent 3 years helping financial institutions across the U.S. with their vendor oversight programs, and 3 years at Jack Henry & Associates, where her team assisted clients in developing commercial lending programs for alternative revenue sources. She understands the needs of customers and members, having worked as a bank Branch Manager and VP of Cash Management, as well as a credit union Sales/Services Training Manager.

Wubbels served in the United States Navy, with a tour in the Gulf War and holds both an MBA in Management and a BA in Business from Doane College. She resides in Jupiter, Florida.

Paul Hickman

Paul Hickman, former longtime aide to late Senator John McCain, took over as President and CEO of the Arizona Bankers Association the day after the general election in 2010. In that capacity, Paul oversees the state and federal government relations operations of the Association, and acts as the chief spokesman for the industry in Arizona.

Before joining the Arizona Bankers Association, Paul was on various staffs of Senator John McCain. He was McCain’s Legislative Assistant chiefly responsible for health care and welfare legislation in the late nineties. He acted as his Deputy Policy Director on the Senator’s 2000 presidential campaign and was his Policy Director on his 2010 U.S. Senate re-election campaign. From 2003 to 2010, Paul was Senator McCain’s State Director running his Arizona offices and acting as his chief political representative in the state during that time.

Immediately before joining the Bankers Association, Paul also acted as the Director of the Republican National Committee’s Arizona Victory campaign, working to elect Republicans to the 112th Congress. A testament to his efforts were three new freshmen U.S. House members from Arizona and two defeated Democratic incumbents.

Rob Nichols

Rob Nichols is the president and CEO of the American Bankers Association, which represents banks of all sizes and charters and is the voice for the nation’s $23.7 trillion banking industry. Rob joined ABA in August 2015 following ten years at the helm of the Financial Services Forum, a non-partisan financial and economic policy organization. Before joining the Forum, Rob served in the George W. Bush administration as the assistant secretary for public affairs at the Treasury Department, a position requiring confirmation by the United States Senate. In this role, he acted as chief spokesperson and head of the office of public liaison, serving as Treasury’s lead representative with the media, business, professional trade organizations, consum-
Selena Samale

Selena Samale, Of Counsel at Stinson, handles mergers and acquisitions, secured lending transactions and general corporate matters. She assists clients in assessing opportunities, structuring investments and financial products, and managing both strategic partnerships and customer relationships. Selena also serves as outside general counsel to privately held businesses, domestic and foreign investors and nonprofit corporations. In this role, she provides continuity across her clients' various investments and throughout the life cycle of their businesses. She counsels clients through ownership changes, internal reorganizations, acquisitions and divestitures, regulatory compliance, and other operational matters. Clients appreciate her creative and dynamic approach to navigating complex legal issues. Selena's clients operate in a diverse range of industries, including banking, financial services, healthcare, mining/energy, construction and technology.

Prior to joining private practice, Selena interned at the Federal Trade Commission (FTC) and taught English in Hong Kong. She is a private pilot with a VFR rating and is ASA certified in Basic Keelboat Sailing.
SAVE THE DATE

Fall D.C. Trip 2022

September 12 - 15, 2022
Washington, D.C

Utah . Wyoming

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2023
TOGETHER AGAIN

Arizona & Colorado Bankers Conference

May 31 - June 3, 2023
Ritz Carlton, Dove Mountain
Marana, Arizona

azbankers.org/events