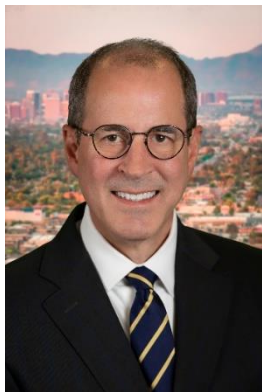


2023 Arizona & Colorado Banker Summit Speakers

Colorado Bankers Association CEO & President, Jenifer Waller



Jenifer Waller was promoted to Chief Executive Officer and President 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, Common Sense Institute, Imagination Library, Society of State Bank Executives, the Western States Director Education Foundation, and The Colorado University School of Business Finance Advisory Council. Waller enjoys politics and volunteering for campaigns. When she is not working, she enjoys spending time with her sons Joe and Travis and husband Doug.



Arizona Bankers Association CEO & President, 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 Hickman oversees the state and federal government relations operations of the Association, and acts as the chief spokesman for the industry in Arizona. Before joining was McCain's Legislative Assistant chiefly responsible for health care and welfare legislation in the late nineties. Hickman 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 Hickman 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, Hickman 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. Hickman holds a Bachelors of Science in Political Science, a Bachelors of Arts in History, and a law degree -- all from Arizona State University. When he is not working Hickman enjoys time at home with his wife, Kate, their 4 children and their boxer, Walter.



Colorado Bankers Association Board Chairman, Mark Hall

As Senior Vice President and Sr. Community Bank Division Leader for Vectra Bank, Mark Hall provides strategic operations, sales leadership, retail, business and commercial banking for markets in the Cortez, Farmington, Durango, Pueblo and Pikes Peak regions. He combines strategic/tactical financial expertise with strong business development skills to align his teams to increase revenues for the bank. Hall brings more than 21 years of expertise to Vectra's Community Banking Division and served in sales leadership positions at Chase, Key Bank and Washington Mutual prior to joining Vectra in 2009. Dedicated to serving his community and family, Hall lives in Littleton and serves as a volunteer leader in numerous organizations including the Colorado Bankers Association, Veterans of Foreign Wars, Boots to Suits, ReBuilding Denver, Vectra Veterans, Adaptive Adventures and is an alumni of Leadership Denver 2020. Hall is a decorated US Navy Veteran, Engineman 2nd Class, that served in the Persian Gulf war.



Arizona Bankers Association Board Chairman, Scott Vanderpool

As President for Bank of America in Phoenix, Scott leads a team focused on driving Bank of America's presence in the communities we serve throughout Maricopa County. This includes brand positioning through sponsorship opportunities as well as philanthropic work through the Bank of America Foundation. In this foundation work, Scott and his team focus on supporting Economic Mobility in Maricopa County and the impact this has on our population and the future of our economy. In addition, Scott is tasked with operational excellence work for Bank of America, its eight lines of business and 8,700 employees who call the Phoenix/Scottsdale market home. In addition to this work, Scott also leads the Bank's Hispanic-Latino Business Council strategy, charged with driving market share in the Hispanic-Latino community through our local leaders in all of our eight lines of business. Prior to this role, Scott was the Market Executive for Bank of America's Business Bank in Colorado, leading a team of relationship managers focused on companies in the lower middle-market space throughout the state. He has also worked on expanding the Bank's industry focuses around Healthcare and Craft Brewing for its Business Banking group. Scott is a graduate of Arizona State University with a B.S. in Supply Chain Management and holds his M.B.A. from the Anderson Graduate School of Management from the University of California at Riverside. He is also a graduate of the Pacific Coast Banking School, the graduate school of banking at the University of Washington - he is also currently a faculty member at Pacific Coast Banking School, teaching their capstone leadership course. In addition, Scott is a current member of the board of directors for three local organizations – Arizona Banker's Association (Chairman), ICAN: Improving Chandler Area neighborhoods, and Education Forward Arizona. Scott has been with Bank of America for 16 years and resides in Phoenix, Arizona, with his wife Christine, daughter London (10) and son Bronx (8).

Incoming Board Chairmen: Don Garner & Shawn Osthoff



Don H. Garner is division CEO of Alliance Bank of Arizona. A founding member of the organization's original management team, Mr. Garner has nearly 30 years of experience in commercial and real estate lending in Arizona. Prior to joining Alliance Bank of Arizona, Mr. Garner spent 14 years with Valley National Bank focusing on real estate lending in the Tucson and Phoenix markets.



Shawn Osthoff, President of Bank of Colorado, is responsible for overseeing the \$4.4+ Billion in assets held by Bank of Colorado across their 49 branches. Mr. Osthoff is a native of Colorado, and attended the University of Northern Colorado where he earned a B.S. in Finance in 1990.

Dan Robb, American Bankers Association



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 as a bank teller in 1985. Dan is active in the local communities serving on various business and non-profit boards and he is involved in multiple civic activity groups. Active in the banking industry, serving the Missouri Bankers Association through the years in various roles, including 8 years on the MBA Board of Directors (MBA Chairman in 2015). Dan served on ABA's Community Bankers Council, Grass Roots Committee and was Chairman of ABA's Government Relations Council in 2020. He also served on the board of ABA's subsidiary Fund for Economic Growth. Dan graduated from the Graduate School of Banking at Colorado in 2000. He has been married to Dianna for 35 years, has two daughters and a son-in-law, and lives in rural Warrenton, Missouri.



Opening Keynote Speaker- Jason Schechterle

On the night of March 26, 2001, a taxi, traveling at over 100mph crashed into the rear of Jason's patrol car. Upon impact, Jason's car burst into flames, trapping him inside. Through a series of miraculous and fateful circumstances, Jason survived the crash and the ensuing physical and emotional catastrophe. He suffered severe burns to over 40% of his body which drastically altered his appearance. He has undergone more than 50 surgeries just to have the ability to accomplish simple daily tasks. Jason's journey chronicles his fight for life, his triumph over tragedy and the inspiration that enables him to continue to overcome unimaginable adversity. His personal narrative exemplifies that the power of the human spirit should never be underestimated. Jason's story is one of life, rebirth, and transformation. Jason represents the human experience at its very best – an ascent from despair to describing himself as the luckiest person alive!

CAMELS Panel Discussion



- **Chris Hill: Bankers Bank of the West**
- **David Messina: FHLBank San Francisco**
- **Marcus Williams: Buchalter**



Yves M. Mombeleur, Clearinghouse CDFI

Yves Mombeleur heads the CCDFI FVLCRUM Fund partnership. He is well versed in strategic partner relationship management. His strong analytical background includes risk assessment, budgets, financial management, and negotiation. Mombeleur has directed all aspects of lending, capital investment, and loan portfolio management. He is experienced with growing businesses from inception to maturity and developing opportunities to yield sustainable, unrestricted funding sources. Mombeleur has a diverse background in community development, brand/reputation risk management, diversity/inclusion initiatives, operational management, and business development. He is also an expert facilitator and coach possessing an acute community awareness critical to the advancement of ongoing CRA initiatives and CSR strategies. Mr. Mombeleur is a Board Member of the Girl Scouts of San Geronio & of the Latino Coalition, as well as Chairman of the Board for the Safety Center and Instituto de Avance Latino. Mombeleur holds an MBA from the Lake Forest Graduate School of Management-Chicago, IL and Jurisprudence from Loyola University Chicago School of Law.



Rhonda Blatti, Service Now

Rhonda is a heart-forward thought leader with a #abundanceofamazing energy and passion for developing high-performing, customer-centric teams, and launching new businesses and the supporting infrastructure. She starts with the "WHY?" and activates on a bold strategy to solve for the highest good for the highest number. Her current niche is innovating for employee experience service delivery gaps in a technology landscape, and accelerating digital transformation that engages the people, drives efficiencies, and delivers tangible outcomes across the enterprise. Rhonda balances her intense passion with a friendly personality, curious mind and a #heartofahero that is in service to humanity. Rhonda is a Seasoned Executive in Technology since 1987 and Architected and delivered Healthcare Workforce solutions for 9 Years. Rhonda has been working as an HR Service Delivery Enthusiast at ServiceNow for 4 years. Her Passions are Innovating solutions and creating new landscapes to help propel customers forward, and building amazing teams. Fun fact: she is an Egyptologist.

Kathy Moe, FDIC San Francisco Region Director



Kathy Moe is the Regional Director of the Federal Deposit Insurance Corporation (FDIC) San Francisco Region. As a 35-year veteran, Moe is directly responsible for the safety and soundness of insured deposits, evaluation of asset and liability management, lending, investment and corporate governance practices of 350 financial institutions in 11 Western States, plus the Pacific U.S. Territories. Leading in a regulated environment subject to economic fluctuations, while navigating complex interagency relations, provides Moe with a unique skill-set. Areas of expertise include, but are not limited to: real estate, commercial credit and investment markets, compliance and risk management, cyber security, anti-money laundering, information technology, vendor management, consumer protection, mergers and acquisitions, and de novo applications. Moe serves on the Board of Directors of the Pacific Bankers Management Institute and is a graduate of the Graduate School of Banking at the University of Colorado. She holds a Bachelor of Science in Finance from the University of Nebraska, and a certificate in Leadership and Management from the University of California at Berkeley.



Jim Hayden, Board Developer

After a successful 25 years+ career in health care as a clinician, leader and an administrator, Jim started managing the one key ingredient of the business world, its people. A passion for the power of serial entrepreneurship and a belief in the significance of impeccable customer service has defined Jim's career. As the founder and CEO of Board Developer, in 2007, Jim and his team's core competency rests on successfully managing businesses and their development with Boards. The team is proactive in establishing a culture of leadership and innovation while embracing high touch Organizational Development, which are the cornerstones to true success at the end of the day with every company and engagement. Jim's Bachelors and Masters degrees are both in Organizational Development. Jim has two grown daughters and is married to his husband, Carl. All of them are Arizona State University alumni. Jim and Carl are world travelers, having visited over 20 countries together.



Nick Reed, Wells Fargo Bank

This year marks Nick Reed's 26th year with Wells Fargo Bank where he is a Director of the Middle Market Commercial Real Estate segment focusing on financing real estate from \$20 to \$200 million. Nick serves his community as current Board Chair for The Children's Museum of Phoenix as well as immediate past Board Chair for Sonoran University which recently awarded him an honorary doctorate for his leadership in transforming the college into a university during a global pandemic. He stays actively engaged in

the development of future leaders as well through Valley Leadership, Leadership West, and Be A Leader Foundation. Nick is a competitive age-group cyclist, photographer, and world traveler. He recently celebrated 14 years of marriage to his beautiful wife, Rebecca, and has a 11-year-old son, Grant, who completed his first triathlon and wants to be an architect when he grows up.



Katie Ratlief, Common Sense Institute

Katie Ratlief currently serves as Executive Director for the Common Sense Institute Arizona. In this role, Katie serves as CSI-AZ's primary spokesperson, and works with the CEO, Board and other partners to ensure that CSI-AZ's mission is fulfilled through programs, strategic planning and community outreach. Prior to joining the Common Sense Institute Arizona, Katie served in former Arizona Governor Doug Ducey's administration for six years. She served as Director of Legislative Affairs, Senior Advisor and Deputy Chief of Staff. In these roles, she led the governor's legislative, policy and budget teams in advocating for policies to ensure Arizona is the best state in which to live, work, play and raise a family. She served as the lead negotiator for the state budget while Deputy Chief of Staff. She is proud to have worked to secure the bipartisan Opioid Epidemic Act, the 20x2020 teacher pay raise, the nation's first universal license recognition law, the state's Drought Contingency Plan, a modernized gaming compact, the largest income tax cut in state history, the largest school choice expansion in the country, and a \$1 billion investment in the state's water resiliency. Katie received her B.A. in Economics and Political Science and her J.D. from the University of Arizona.



Kelly Caufield, Common Sense Institute

Kelly Caufield is the Executive Director of the Common Sense Institute. In this role, Kelly is the key management leader of CSI and oversees the administration, strategic plan, and programming for the organization. Kelly brings nearly 20 years of policy, research, and advocacy experience to CSI. Before joining CSI, Kelly served as the Vice President of Government Affairs for Colorado Succeeds, a coalition of business leaders dedicated to improving public education. In this role she oversaw statewide coalition building efforts that brought diverse business, education, and community partners together in collaborative ways around a shared policy agenda. Kelly also has experience as a federal lobbyist for the Society for Human Resource Management (SHRM), focusing on labor and employment policy on behalf of 275,000 HR business professionals. Before joining SHRM, she spent a total of eight years on Capitol Hill working on the U.S. Senate Health, Education, Labor, and Pensions Committee and served as a legislative director for a U.S. Congressman. She attended the College of William and Mary in Virginia for her undergraduate degree and George Washington University for her master's degree in Public Policy. She currently lives in Denver with her husband and two sons.



Congressman Juan Ciscomani

Congressman Juan Ciscomani represents Arizona's 6th Congressional District in the United States House of Representatives. Juan and his family immigrated to the United States when he was a young boy. They established roots in Tucson, Arizona, where his father worked as a bus driver to give his children a shot at the American Dream. Growing up in a working class family taught Juan the value of hard work and the importance of a can-do attitude. Juan attended public schools in Tucson, Pima Community College and the University of Arizona. He worked his way through school with maintenance and service jobs until becoming the first in his family to graduate from college. After college, Juan worked for the University of Arizona and the Tucson Hispanic Chamber of Commerce before joining Arizona Governor Doug Ducey's administration as Senior Advisor and Vice-Chair of the Arizona-Mexico Commission. Juan focused on the issues of international trade and diplomacy, border security, and economic development. In 2022, Juan was elected to represent Arizona's new 6th congressional district, becoming the first naturalized American citizen from Mexico elected to the U.S. House of Representatives in Arizona history. Juan often shares a conversation with his dad where his dad asked him: *"Where else could we have our story? We come to the US, learn English, immerse in the culture, become US citizens, I drive a bus most of my life, and now my son is a United States Congressman. Where else in the world? Nowhere else, that's the American Dream."* Juan is determined to fight to keep that dream alive for others. Juan resides in Tucson with his wife, Laura, and their 6 kids — Zoe, Juan David, Kenny, Lily, Lucas, and Gloria.



Closing Keynote Speaker- Kimberly Yee, Arizona State Treasurer

Kimberly Yee is the State Treasurer of Arizona, Arizona's chief banking and investment officer, and oversees the cash management of Arizona's \$63.28 billion state budget and payments to agencies, local governments, and schools. Treasurer Yee is also the Administrator of the AZ529 Education Savings Plan and serves as an advocate for financial literacy in Arizona. Treasurer Yee is the first Asian American elected to a statewide office in Arizona's history. She is also the first Chinese American Republican woman to win a major statewide office in United States history. Kimberly Yee was elected to the Arizona Legislature in 2010 and served as the Senate Majority Leader - the second woman elected as Senate Majority Leader in Arizona's history, following U.S. Justice Sandra Day O'Connor who served in the position in 1973. With eight years of experience in the Arizona Legislature, and four years working for the Arizona State Treasurer's Office, Treasurer Yee brings a unique perspective to this important financial leadership role.

Special Thank You to our Marquis & Platinum Sponsors

- Wifi, [Bell Bank](#)
- Daily Flyers & Day 1 Breakfast, [Bankers Bank of the West](#)
- Chairman's Welcome Reception, [Lewis Roca](#)
- Keynote Opening Speaker: Jason Schechterle, [Eide Bailly LLP](#)
- Keynote Closing Speaker: Treasurer Kimberly Yee, [File Invite](#)
- Lanyards, [Preferred Lending Partners](#)
- Emerging Leaders Reception, [Quarles & Brady LLP](#)
- CEO Roundtable, [JMFA](#)