

2023 Arizona & Colorado Banker Summit

May 31 - June 3, 2023

ARIZONA & COLORADO ASSOCIATION LEADERSHIP & GENERAL SESSION EMCEES



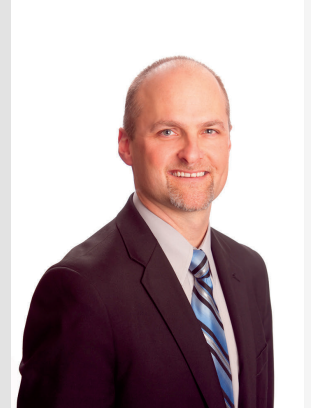
Scott Vanderpool
Bank of America
AzBA Chairman



Paul Hickman
AzBA
CEO & President



Jenifer Waller
CBA
CEO & President



Mark Hall
Vectra Bank
CBA Chairman

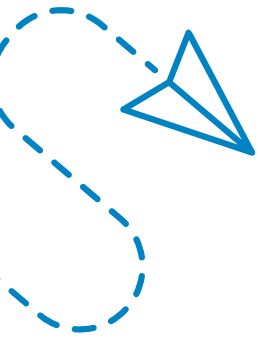


**ARIZONA BANKERS
ASSOCIATION**



**COLORADO
THE BANKERS
ASSOCIATION**

3rd Annual Arizona & Colorado Banker Summit | May 31 - June 3, 2023
Ritz Carlton at Dove Mountain, Marana, Arizona | <https://azbankers.org/2023BankerSummit>



Explore
TUCSON, ARIZONA



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MUSEUM



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2023 SCHEDULE HIGHLIGHTS

RECEPTIONS

**31
MAY**

Attire-
Resort Casual

CHAIRMAN'S RECEPTION

5:30 - 7:00 PM Ritz-Carlton Terrace

Join the AzBA & CBA Chairmen with our sponsors Lewis Roca to kick off this year's Summit

**01
JUN**

Attire-
Don't forget to
pack your
favorite sports
team gear!

EMERGING LEADER & BANK ADVOCATE RECOGNITION RECEPTION

5:30 - 7:00 PM Ritz-Carlton Terrace

Join AzBA & CBA in celebrating the Emerging Leaders & Bank Advocate Program Graduates attending the Summit with our sponsors Quarles & Brady LLP

NBA Championship Game 1 will be on at the reception- #BringItIn Nuggets!

Please Wear Your Nametag for Sessions, Receptions & Meals



GENERAL SESSION

THURSDAY, JUNE 1ST ATTIRE- BUSINESS CASUAL

7-8AM

BREAKFAST BUFFET

All attendees & guests are welcome to join our sponsors Bankers' Bank of the West for breakfast on the Tortolita Terrace and preview of the exhibitors outside Ballroom 1/2/3/4

**8:00-
8:25AM**

GENERAL SESSION WELCOME

The AzBA & CBA Leadership will kick off the day with a special thank you to our Marquis Sponsors from Bell Bank for providing the WiFi for the event.

**8:25-
8:55 AM**

OPENING SPEAKER

Dan Robb, Chairman of the Board at the American Bankers Association

**9:00-
10:00
AM**

KEYNOTE SPEAKER

One Man's Life Changing Story of Survival : Jason Schechterle sponsored by Eide Bailly LLP

**10:00-
10:15
AM**

BREAK

Refreshments sponsored by Moss Adams

**10:15-
11:45
AM**

CAMELS : THE GREAT DEBATE

Join Chris Hill, Marcus Williams & David Messina for an interactive, live polling session on the regulatory rating system. Scan the QR code to participate in the live polling.

GENERAL SESSION

THURSDAY, JUNE 1ST

11:45 -
12:30
PM

RECRUITMENT & RETENTION

Join employee workflow expert, Rhonda Blatti, from ServiceNow for a fresh look at proven recruitment & retention hits and misses from the top performing companies, nationwide.

12:30 -
1:30 PM

LUNCH

All attendees and guests are welcome to join lunch on the Tortolita Terrace with our sponsors from Virtual Innovation

1:30 -
2:25 PM

RETHINKING CRA

Yves M. Mombeleur from Clearinghouse, CDFI will share innovative and proven ways to rethink CRA.

2:30 -
3:25 PM

INSIGHTS INTO FINANCIAL INDUSTRY CHALLENGES & DEPOSIT INSURANCE REFORM

Indepth & informative presentation with Q&A with FDIC, San Francisco Director, Kathy Moe

3:30 -
3:45 PM

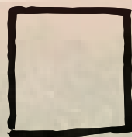
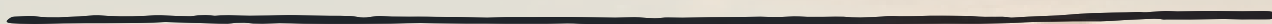
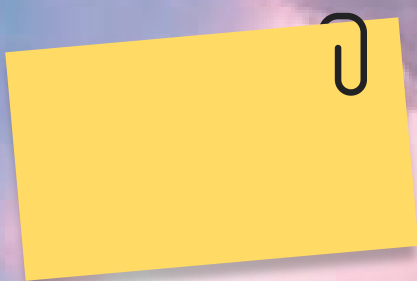
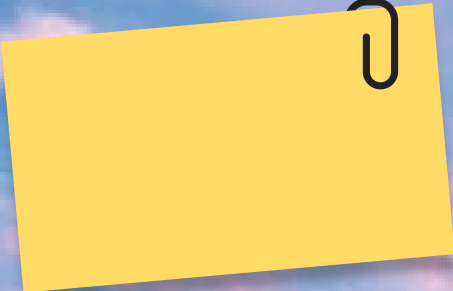
BREAK

Refreshments sponsored by Engelman Berger

3:45 -
4:45 PM

GETTING YOUR BOARD, ON BOARD

Jim Hayden, CEO at Board Developer, shares his expertise from years of consulting on board effectiveness across a wide breadth of organizations & companies.



GENERAL SESSION

FRIDAY, JUNE 2ND ATTIRE- BUSINESS CASUAL

7-8AM

ARIZONA ANNUAL MEETING BREAKFAST

Early continental breakfast for Required Annual Meeting/Voting Bank Members of AzBA on the Ritz-Carlton Terrace. Associate Member attendance is optional.

**8:00-
9:00 AM**

CONTINENTAL BREAKFAST

All attendees & guests NOT participating in the AzBA Annual Meeting are welcome to join our sponsors from BHG Financial for breakfast on the Ritz-Carlton Terrace.

**9:05-
9:30 AM**

AZBA EMERGING LEADER GRADUATION & DAY 2 WELCOME

**9:30-
10:25
AM**

STATE GOVERNMENT RELATIONS UPDATE

Association CEO/Presidents : Jenifer Waller & Paul Hickman provide an update on the 2023 session

**10:25-
10:45
AM**

BREAK

Refreshments sponsored by FHLBank Topeka

**10:45-
11:55
AM**

FOSTERING LEADERSHIP

Join AzBA Member Bankers & Emerging Leader Alumni, Nick Reed & Adaliz Gimenez for a session on rethinking mentoring & fostering leaders.

GENERAL SESSION

FRIDAY, JUNE 2ND

12:00 -
1:00 PM

LUNCH

All attendees and guests are welcome to join lunch on the Ritz-Carlton Terrace with our sponsors from Equipment Leasing Services.

1:00 -
2:15 PM

HOUSING, ENERGY, WATER & LABOR ISSUES

Join the Common Sense Institute for a deep dive into the data, policy and referendums influencing Colorado & Arizona's top issues across both states.

2:15 -
3:15 PM

FEDERAL LEGISLATIVE UPDATE

Join Congressman Juan Ciscomani for an update from the 118th Congressional Session.

3:15 -
3:30 PM

BREAK

Refreshments sponsored by Olsen Palmer LLC

3:30 -
4:30 PM

STATE POLICY & POLITICS

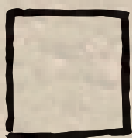
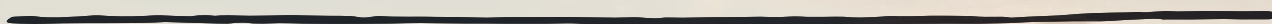
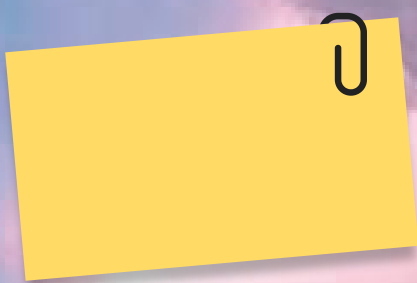
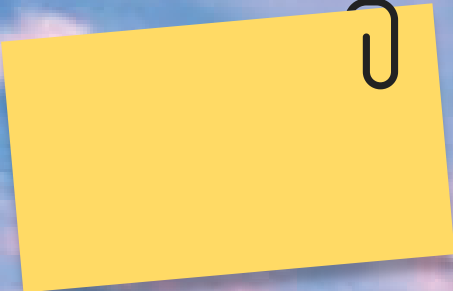
Join the Arizona State Treasurer, Kimberly Yee, for a review of state policies & politics and innovative strategies being explored at the state level.



ARIZONA BANKERS
ASSOCIATION



COLORADO
THE BANKERS
ASSOCIATION



AZBA BANKERS CUP
SATURDAY, JUNE 3RD

Alliance Bank
OF ARIZONA

**6:30-
7:00 AM**

DEPART HOTEL LOBBY

Bellmen staff will check clubs in on arrival for delivery to the golf club and transport golfers from the valet area. Plan to arrive early if you are renting clubs.

**7:00-
7:30 AM**

GRAB & GO COFFEE/BREAKFAST

Check-in, grab breakfast & report to your assigned foursome

**7:30-
1:00 PM**

SHOTGUN/SCRAMBLE START

Foursomes will be assigned a starting hole for a group 7:30 AM start. Groups will play the front 9 of Wild Burro & Tortolita courses.

**1:00-
2:00 PM**

LUNCH & BAKERS CUP AWARDS

Golfers & spouses are invited to join our sponsors from Alliance Bank of Arizona, Sonoran Capital Advisors & Low Income Based Scholarships for the lunch & awards ceremony

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EXHIBITORS



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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

VIRTUAL SPONSORS





Alliance Bank

OF ARIZONA

GOLF

Tournament

Saturday, June 3, 2023

Cart Sponsor \$500

Includes 2 Players & Logo on Cart

Alliance Bank of Arizona AzBA Bankers Cup Golf Tournament
Golf Club at Dove Mountain, Marana, Arizona

June 3, 2023

4 person Scramble – No Handicaps

- 7:30 AM Shotgun start- Coffee & Grab & Go Breakfast Sandwiches @7:00 AM
- 40-50 players
- Drink Tickets (2)
- Hole in One for Bell Bank Golf Cart
- Two drink tickets per player
- Mulligans - \$25 for 1 / \$100 for 5 (Individual)

AWARDS- All Awards Include \$100 Total Wine Gift Card

- Men's & Women's Longest Drive- Sponsored by Sonoran Capital Advisors
- Men's & Women's Longest Putt- Sponsored by Sonoran Capital Advisors
- Closest to the Pin [Par 3: Front 9 & Back 9]- Sponsored by Sonoran Capital Advisors
- Winning Foursome- Sponsored by Alliance Bank of Arizona
- Hole in One [Bell Bank Golf Cart Prize]- Minimum Yards to Pin: Men's 165, Women's 140

Golf Tournament Fees

Individual Player \$150

Sponsor Cart (Includes 2 players) \$500

Mulligans \$25 or 5 for \$100

Club Rental \$40

Quarles



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Arizona & Colorado Banker Summit Speaker Bios

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 the 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).

Welcome! Incoming Board Chairmen: Don Garner & Shawn Osthoff

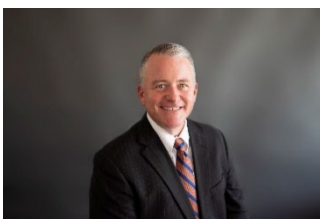


Don H. Garner is division CEO of Alliance Bank of Arizona. A founding member of the organization's original management team, Mr. Garner has nearly 30 years of experience in commercial and real estate lending in Arizona. Prior to joining Alliance Bank of Arizona, Mr. Garner spent 14 years with Valley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



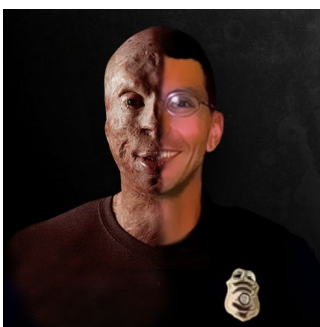
Shawn Osthoff is the President of Bank of Colorado and is responsible for overseeing the \$4.4+ Billion in assets held by Bank of Colorado across their 49 branches. Mr. Osthoff is a native of Colorado, and attended the University of Northern Colorado where he earned a B.S. in Finance in 1990.

ABA Welcome- 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 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. 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 and was 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. Dan has been married to Dianna for 35 years and 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 cab, 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 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 we often take for granted. 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 can never be underestimated or extinguished. His 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](#)

[SanFrancisco](#) & [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 Gorgonio & 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



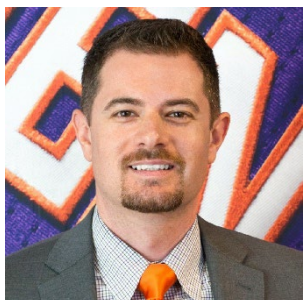
Kathy Moe is the Regional Director of the Federal Deposit Insurance Corporation (FDIC) San Francisco Region. As a 35-year veteran, Moe is directly responsible for the safety and soundness of insured deposits, evaluation of asset and liability management, lending, investment and corporate governance practices 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. She is 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 Kimberly 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. She was 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, as well as four years working for the Arizona State Treasurer's Office as a staff member, Treasurer Yee brings a unique perspective to this important financial leadership role for Arizona.

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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](#)

2023 Arizona & Colorado Banker Summit Schedule

Start Time	End Time	Event Name	Location	Who Should Attend?
Wednesday – May 31, 2023				
1:00 p.m.	3:00 p.m.	Exhibitor Setup	Ritz-Carlton Pre-function	Exhibitors
3:00 p.m.	5:00 p.m.	CEO Roundtable	Ritz-Carlton Ballroom 3/4	CEO's – Invitation Only
5:00 p.m.	5:30 p.m.	Exhibitor Preview for CEO's	Exhibit Hall Pre-function	CEO's – Invitation Only
4:00 p.m.	6:00 p.m.	Conference Registration	Exhibit Hall Pre-function	Attendees, Sponsors & Guests
5:30 p.m.	7:00 p.m.	Arizona & Colorado SBA Chairman's Reception	Ritz-Carlton Terrace	Attendees, Sponsors & Guests
7:30 p.m.		Dinner on your own	On Property Dining Options	Attendees, Sponsors & Guests
Thursday – June 1, 2023				
7:00 a.m.	8:00 a.m.	Late Conference Registration	Exhibit Hall Pre-function	Attendees, Sponsors & Guests
7:00 a.m.	8:00 a.m.	Breakfast Buffet	Ritz-Carlton Terrace	Attendees, Sponsors & Guests
8:00 a.m.	8:25 a.m.	Welcome Paul Hickman , Scott Vanderpool , Jenifer Waller & Mark Hall	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors
8:25 a.m.	8:55 a.m.	Opening Speaker Dan Robb , Chairman American Bankers Association	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors
9:00 a.m.	10:00 a.m.	One Man's Life Changing Story of Survival Jason Schechterle	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors
10:00 a.m.	10:15 a.m.	Break	Exhibit Hall Pre-function	Attendees & Sponsors
10:15 a.m.	11:45 a.m.	CAMELS The Great Debate Chris Hill , Bankers Bank of the West Marcus Williams , Buchalter David Messina , FHLBank San Francisco	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors
11:45 a.m.	12:30 p.m.	Recruitment & Retention Rhonda Blatti , ServiceNow	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors
12:30 p.m.	1:30 p.m.	Lunch	Ritz-Carlton Terrace	Attendees, Sponsors & Guests
1:30 p.m.	2:25 p.m.	Rethinking CRA Yves M. Mombeleur , Clearinghouse CDFI	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors
2:30 p.m.	3:25 p.m.	Insights Into Financial Industry Challenges & Deposit Insurance Reform Kathy Moe , Director FDIC San Francisco	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors
3:30 p.m.	3:45 p.m.	Break	Ritz-Carlton Terrace	Attendees & Sponsors
3:45 p.m.	4:45 p.m.	Getting Your Board On Board Jim Hayden , Board Developer	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors

Start Time	End Time	Event Name	Location	Who Should Attend?
4:45 p.m.	5:00 p.m.	Emerging Leader & Bank Advocacy Introductions Paul Hickman & Jenifer Waller	Ritz-Carlton Ballroom 1/2	Attendees & Sponsors
5:30 p.m.	7:00 p.m.	Arizona Emerging Leaders & Colorado Bank Advocacy Group Recognition Reception	Ritz-Carlton Ballroom 1/2	Attendees, Sponsors & Guests <i>Attire: Favorite Sports Team Apparel</i>
7:00 p.m.		Dinner On Your Own	On Property Dining Options	Attendees, Sponsors & Guests
Friday, June 2, 2023				
6:00 a.m.	6:30 a.m.	Optional Social Run/Walk *Bring Water!	Meet in Hotel Lobby	Out & Bank Run or Walk with Rick Herold- Spencer Fane
7:00 a.m.	8:00 a.m.	AzBA Annual Meeting Registration	Exhibit Hall Pre-function	AzBA Annual Meeting Attendees
7:00 a.m.	8:00 a.m.	Arizona Banker Breakfast	Ritz-Carlton Terrace	Arizona Bankers & Guests
8:00 a.m.	9:00 a.m.	General Attendee Breakfast	Ritz-Carlton Terrace	Colorado Bankers & Guests Summit Sponsors & Associate Members
8:00 a.m.	9:00 a.m.	Arizona Bankers Association Annual Meeting	Ritz-Carlton Ballroom 1/2	AzBA Bank Voting Members Required Attendance
9:05 a.m.	9:30 a.m.	Emerging Leader & Bank Advocacy Graduation & Day 2 Welcome Paul Hickman & Jenifer Waller	Ritz-Carlton Ballroom 1/2	Attendees, Sponsors
9:30 a.m.	10:25 a.m.	State GR Updates Jenifer Waller, Paul Hickman, Alison Morgan & Steven Killian	Ritz-Carlton Ballroom 1/2	Attendees, Sponsors
10:25 a.m.	10:45 a.m.	Break	Ritz-Carlton Ballroom 1/2	Attendees, Sponsors
10:45 a.m.	11:55 p.m.	Fostering Leadership Nick Reed, Wells Fargo with Adaliz Gimenez, Bell Bank	Ritz-Carlton Ballroom 1/2	Attendees, Sponsors
12:00 p.m.	1:00 p.m.	Lunch	Ritz-Carlton Terrace	Attendees, Sponsors & Guests
1:00 p.m.	2:15 p.m.	Housing, Energy, Water & Labor Issues – Katie Ratlief, Common Sense Institute	Ritz-Carlton Ballroom 1/2	Attendees, Sponsors
2:15 p.m.	3:15 p.m.	Federal Legislative Update- Juan Ciscomani- Arizona Congressman, Committee on Appropriations. Subcommittee on Financial Services	Ritz-Carlton Ballroom 1/2	Attendees, Sponsors
3:15 p.m.	3:30 p.m.	Break	Ritz-Carlton Terrace	Attendees, Sponsors
3:30 p.m.	4:30 p.m.	State Policy & Politics- Kimberly Yee, Arizona State Treasurer	Ritz-Carlton Ballroom 1/2	Attendees, Sponsors
4:30 p.m.	4:45 p.m.	Closing Remarks & iPad Raffle	Ritz-Carlton Ballroom ½	Attendees, Sponsors
5:30 p.m.	8:00 p.m.	Minibus transportation from 5:30 p.m. – 8:00 p.m. for dinner on your own at Caytons	Roundtrip Bus Route From Main Lobby to Dove Mountain Golf Club	Attendees, Sponsors & Guests

Saturday, June 3, 2023
Alliance Bank of Arizona Bankers Cup
Golf Tournament

7:00 a.m.	7:30 a.m.	Golfers Breakfast	The Fountain at the Golf Club at Dove Mountain	Golf Tournament Players
7:30 a.m.	1:00 p.m.	Alliance Bank of Arizona Bankers Cup Golf Tournament Shot Gun/Scramble	The Golf Club at Dove Mountain	Golf Tournament Players
1:00 p.m.	2:00 p.m.	Bankers Cup Awards Lunch	Kiva Patio at the Golf Club at Dove Mountain	Golf Tournament Players & Guests

G O L F T O U R N A M E N T S P O N S O R S

Alliance Bank
OF ARIZONA



SONORAN
CAPITAL ADVISORS



Alliance Bank
OF ARIZONA

GOLF
Tournament

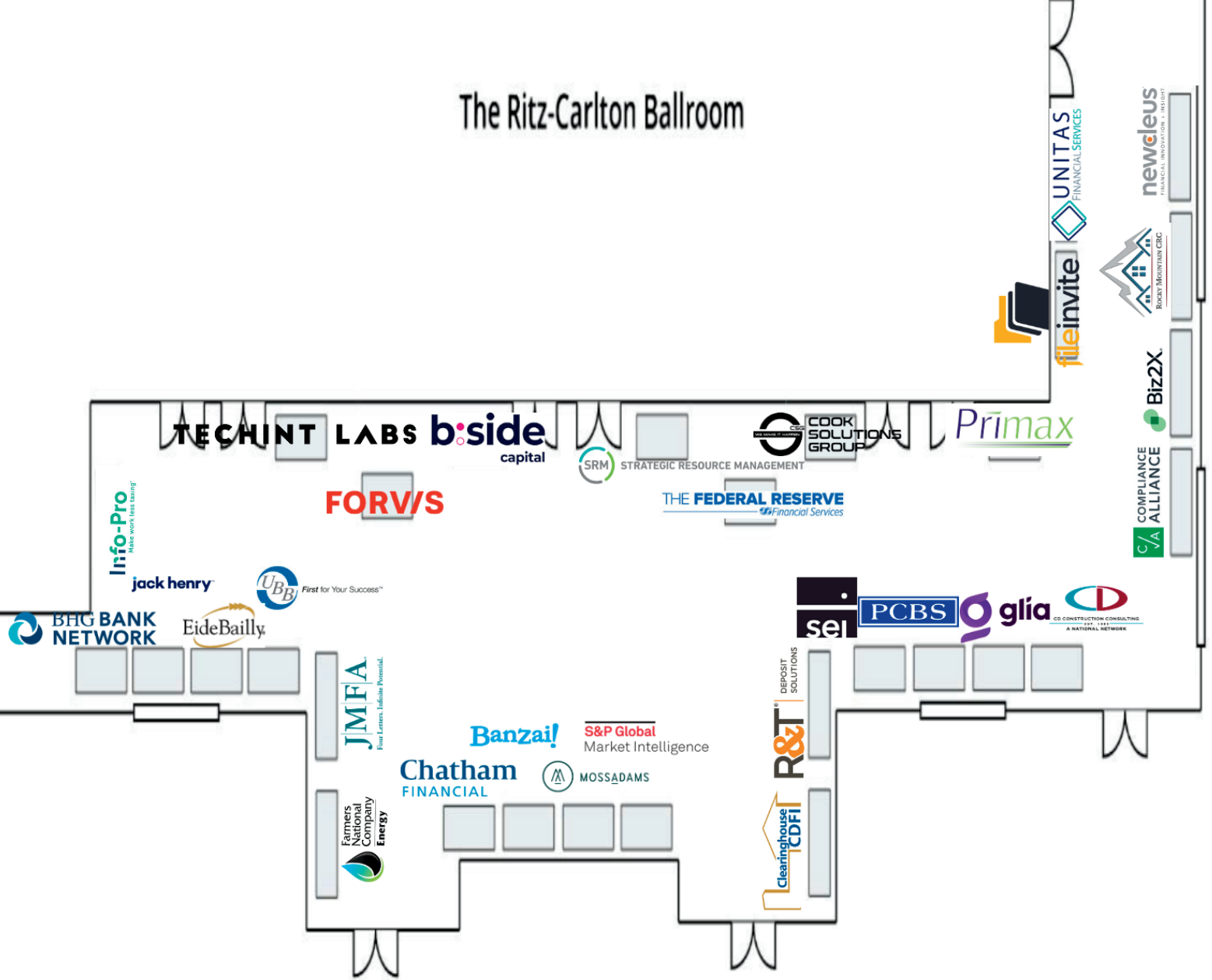
Saturday, June 3rd

Sponsor a Cart
\$500

Individual
Players \$150

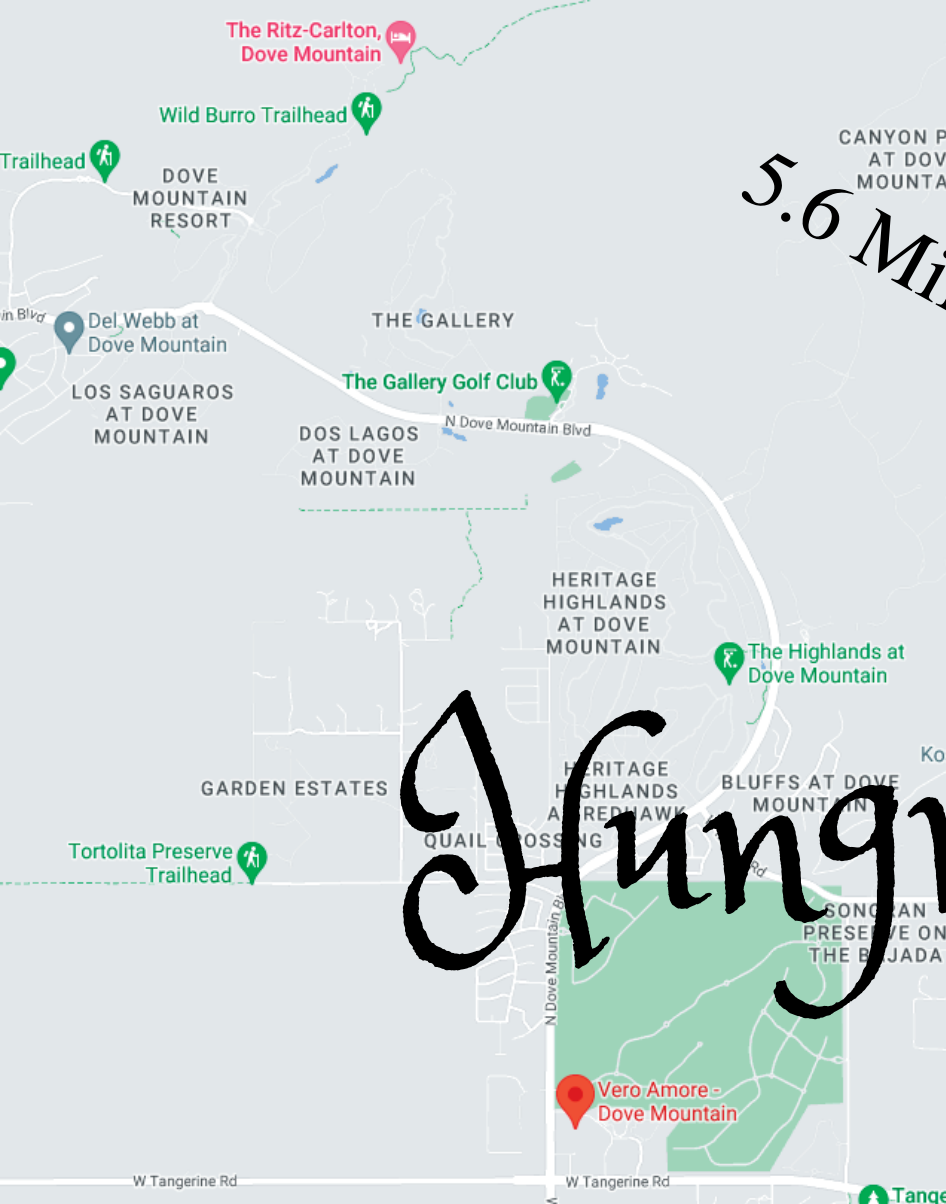
Includes 2 Players & Logo on Cart

The Ritz-Carlton Ballroom



The Ritz-Carlton Terrace

Table	Raffle Prize	Company	Table	Raffle Prize	Company
1	Air Pods	Unitas Financial Services	16	\$100 Gift Card	Farmers National Company Energy
2		File Invite	17		Chatham Financial
3		Primax	18	Surprise	Banzai Inc.
4		Cook Solutions Group	19	\$250 Visa Gift Card	Moss Adams
5		Federal Reserve Financial Services	20		S&P Global Market Intelligence
6		Strategic Resource Management	21		Clearinghouse CDFI
7	Wine Basket	B:Side Capital	22	\$100 Amazon Gift Card	Reich & Tang Deposit Solutions
8	JBL Speaker	FORVIS	23	Ray Ban Sunglass Gift Card	SEI Sphere
9	Wine	Techint Labs	24		PCBS - Pacific Coast Banking School
10		Info-Pro Lender Services	25	Air Pods	Glia
11	Big Yeti, Taylormade M6 Driver	BHG Bank Network	26	Scotty Cameron Putter	CD Construction Consulting
12		Jack Henry	27		Biz2X
13		Eide Bailly LLP	28		Review Alliance
14	\$100 Visa Gift Card	United Bankers' Bank	29		Newdeus
15		JMFA	30		Rocky Mountain Community Reinvestment Corporation



5.6 Mile/10 Minute Drive

Hungry?

Vero Amore Italian & Pizza
Dove Mountain Brewing Co.
Walgreens





ritz kids
MENU

BREAKFAST \$18

7:00AM - 11:00AM

Meals include a muffin, choice of main selection and kid's beverage

GREEN SMOOTHIE   

blend of spinach, banana, coconut water, peach, pineapple, mango

STRAWBERRY-BANANA

SMOOTHIE  

honey, yogurt, apple juice, strawberry, banana

ARIZONA BOWL    

prickly pear nectar

PARFAIT 

prickly pear marmalade, organic berries, native seed granola

MÜESLI  

gluten-free overnight oats, granny smith apple, sun-dried blueberries, organic greek yogurt

OATMEAL    

brown sugar, raisins

CEREAL & MILK

choice of milk

PANCAKES 

chocolate chip or blueberry, snow sugar, vermont maple syrup

WAFFLES 

berry compote, snow sugar, vermont maple syrup

FRENCH TOAST 

berries compote, snow sugar, vermont maple syrup

ONE EGG ANY WAY   

hash browns, greens

LUNCH & DINNER \$24

11:00AM - 9:30PM

Meals include a nibble, choice of main selection, sweet and kid's beverage

NIBBLES

veggie sticks, steamed broccolini, garden salad, seasonal fruit, mashed potatoes, french fries, sweet potato fries

MAIN SELECTIONS

HUMMUS 

raw veggies

PASTA 

housemade pomodoro or butter, parmesan (gluten-free pasta upon request)

GRILLED CHEESE 

swiss, aged cheddar, brioche (gluten-free bread upon request)

SEARED SALMON   

GRILLED ORGANIC CHICKEN   

(hormone and preservative-free)

CHICKEN TENDERS 

honey mustard or ranch dressing

SAUTÉED BEEF  

seasonal veggies, soy sauce

BURGER 

american cheese, lettuce, tomato, brioche (gluten-free bun upon request)

HOT DOG 

all-natural beef hot dog, brioche bun

SWEETS

PALETA   

assorted organic flavors

CAKE POPS 

vanilla cake, white chocolate, rainbow sprinkles

CHOCOLATE CHIP COOKIE 

KIDS BEVERAGES

JUICE

orange , apple or cranberry

MILK

skim, 2%, whole, soy  or almond 

LEMONADE

 **ORGANIC OPTIONS**  **HEALTHY CHOICE**  **VEGETARIAN**  **VEGAN**
 **GLUTEN-FREE**  **PLANT-BASED**  **DAIRY-FREE**  **NUT-FREE**

Complimentary for children under 2

Consuming raw or undercooked meats, poultry, seafood, shellfish, or eggs may increase your risk for foodborne illnesses, especially if you have certain medical conditions.



THE RITZ-CARLTON
DOVE MOUNTAIN

UPPER JAVELINA TRAILHEAD

WLD BURRO TRAILHEAD

THE GOLF CLUB
AT DOVE MOUNTAIN

RITZ-CARLTON
GATE HOUSE

THE GALLERY GOLF CLUB

1 Mile
at Dove Mountain Rd

3 Miles
at Dove Canyon Pass

2 Miles
at Sonoran Links Lane

4 Miles
at Pier Mountain Rd

THE HIGHLANDS AT DOVE MOUNTAIN

TORTOLITA PRESERVE TRAILHEAD

5 Miles
at Dove Mountain Park Rd

5.7 Miles at Tangerine Rd

Tangerine Rd

●●●● 11.4 Mile Route Round Trip

