

27TH ANNUAL TRUST ADVISORS FORUM

Pinehurst Resort, NC | February 25 - 28, 2018



CHOOSING YOUR BEST STRATEGY





WELCOME TO THE FORUM

Dear Colleague:

I'm delighted to announce the 2018 Trust Advisors Forum will be held February 25 - 28, 2018 at the fabulous Pinehurst Resort in North Carolina! Now in its 27th year, this is the nation's premier conference for wealth management and trust professionals, as well as other specialists in investing, financial planning, taxation, accounting, and law. The Trust Education Foundation, Inc. and Campbell University are sponsoring this year's Forum.

The Forum's presentations, discussions, and social events offer you exceptional educational and networking opportunities. You'll be able to exchange information and ideas with colleagues from across the country — and earn continuing education credits in the process.

In today's troubled times, you need more than just information. You need insights to help your firm adapt and thrive in a financial marketplace that has seen its share of challenges in the past few months. Our agenda includes sessions on estate and financial planning, taxation, fiduciary law, compliance issues, market outlooks, and business development strategies.

I've attended the Forum for several years and have made many good friends and useful contacts, including the next generation of innovators in our field – the graduates of Campbell University's Trust and Wealth Management programs.

We would love to have you join us at Pinehurst next February. Before the hectic holiday season begins, please take a few minutes to register for the Forum and make your hotel and travel reservations. Use the forms in this booklet, or visit www.trusteducationfoundation.com.

Thank you for your interest in the Forum! See you in 2018!

Cordially,



Becky T. Kelly
Executive Director
Trust Education Foundation, Inc. of Campbell University
Partner
Fiduciary Education Center, LLC



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MEET THE SPONSORS

The Trust Education Foundation, Inc. and Campbell University are the primary sponsors of the 2018 Trust Advisors Forum.

- ▶ The Trust Education Foundation, Inc., was established in 1971 by Campbell University to ensure that academic programs in trust and wealth management remain aligned with evolving industry needs. The Foundation analyzes curricula and also sponsors scholarships, library and technology resources, and educational opportunities. Its Board of Directors includes 40 financial services professionals from 20 firms.
- ▶ Campbell University is the only educational institution in the country to offer both undergraduate and graduate degrees in Trust and Wealth Management.

Visit www.trusteducationfoundation.com and www.campbell.edu for more information.



Earn Education Credits

Forum attendees are entitled to receive CFP® (18 hours), CTFA (18 hours), and/or CRSP (18 hours) continuing education credits.

Questions may be directed to

Jimmy Witherspoon
1-800-334-4111, ext. 1387
witherspoon@campbell.edu

The Institute of Certified Bankers (ICB), a subsidiary of the American Bankers Association, is dedicated to promoting the highest standards of performance and ethics within the financial services industry. This statement should not be viewed as an endorsement of this program or its provider.

Certified Financial Planner Board of Standards, Inc. owns the marks CFP®, CERTIFIED FINANCIAL PLANNER, and CFP®, which are awarded to individuals who successfully complete the initial and ongoing certification requirements.



Lundy-Fetterman
School of Business



REGISTRATION

SUNDAY, FEBRUARY 25, 2018

3:00 pm – 6:00 pm

Forum Registration

6:00 pm – 7:30 pm

Opening Session Reception & Cocktail Party
Cardinal Room

Phillip Strickland - 2018 President
Trust Education Foundation, Inc.
Senior Vice President / Manager of Institutional Trust Administration
First Citizens Bank

Becky Kelly - Executive Director
Trust Education Foundation, Inc.
Managing Partner
Fiduciary Education Center, LLC

Dining on your own

Day One

6:30 am – 8:00 am

Monday, February 26, 2018

Breakfast Buffet
Carolina Dining Room

8:00 am – 10:00 am

Hot Topics in Estate Planning - A Look at the New Tax Law

C. Gray Johnsey, Esquire
White & Allen P.A.

Elinor J. Foy, Esquire
Wyrick Robbins Yates & Ponton

10:00 am – 10:30 am

Break and Exhibits
Cardinal Room

10:30 am – 11:15 am

The Foundation, Campbell University and Student Introductions

“50 Year Celebration of Trust & Wealth Management at Campbell”

Ryan A. Newkirk - Member, TEF Board
Senior Vice President and Wealth Advisor
Wells Fargo Private Bank

John V. Elliott - Member, TEF Board
Senior Vice President and Fiduciary Management Services Director
Wells Fargo

Dr. J. Bradley Creed
President
Campbell University

11:15 am – 12:30 pm

Lunch
Carolina Hall

12:30 pm – 2:00 pm

Management Panel

John V. Elliott - Introductions
Senior Vice President and Fiduciary Management Services Director
Wells Fargo

Ryan A. Newkirk - Moderator
Senior Vice President and Wealth Advisor
Wells Fargo Private Bank

Panelists:

David G. Coffaro
Head of Trust & Fiduciary Services
Wells Fargo Private Bank

Tom Oehmler
President
Comerica Trust Wealth Management

Kim Johnson
Executive Vice President
Chief Fiduciary/Administrative Manager
BB&T Wealth

2:00 pm - 3:00 pm

Administration and Identification of Digital Assets for Fiduciaries

Bruce D. Hendryx
Senior Vice President, Director of Closely Held Business Strategies
PNC Wealth Management

3:00 pm – 3:30 pm

Break and Exhibits

Cardinal Room

3:30 pm - 4:30 pm

Economic and Market Outlook

Linda A. Duessel CFA, CFP, CPA
Senior Vice President
Federated Investors, Inc.

4:30 pm – 5:30 pm

The Delaware Edge

Michael E. Roberts, Esquire
President
Reliance Trust Company of Delaware

6:00 pm - 8:00 pm

Reception & Cocktail Party

Cardinal Room

Dining on your own



Day Two

Tuesday, February 27, 2018

6:30 am - 8:00 am

Breakfast Buffet
Carolina Dining Room

8:00 am - 9:30 am

Current Issues with Distribution Standards: Can They Come Back to Bite You

Charles (Skip) D. Fox IV, Esquire
Partner
McGuireWoods, LLC

9:30 am - 10:00 am

Break and Exhibits
Cardinal Room

10:00 am - 11:00 am

Regulatory Update

Eugene F. Maloney, Esquire
Executive Vice President and Corporate Counsel
Federated Investors, Inc.

11:00 am - 12:00 pm

The End of Inefficient Lawyers, Thank Goodness!

Jamie Hargrove, Esquire, CPA
Hargrove Madden LLP

12:00 pm - 1:30 pm

Lunch
Carolina Hall

1:30 pm - 2:30 pm

The Promise and Pitfalls of Unique and Hard to Value Assets

Richard W. Jacobs
Senior Vice President
PDS Services an Innovest Systems Company

2:30 pm - 3:30pm

What You Need to Know When Building Factor-Based Portfolios

Meggan Friedman
Senior Vice President and Senior Investments Sales Strategist
Northern Trust Asset Management

3:30 pm - 7:00 pm

Dining on your own



Day Three

Wednesday, February 28, 2017

6:30 am - 8:00 am

Breakfast Buffet
Carolina Dining Room

8:00 am – 9:30 am

The Changing Landscape of Serving Philanthropic Organizations

Hank Dunbar, Esquire
Manager, Charitable and Philanthropic Services
First Citizens Bank

9:30 am - 11:00 am

Compliance and Risk Management Panel

Patrick Alyward - Moderator
Senior Vice President
RIC

Panelists:

Kristen Veros
Senior Vice President, Compliance Manager
Wells Fargo Wealth Management

Tristan A. McCormick
Senior Vice President, Senior Trust Officer & Fiduciary Risk Director
Huntington National Bank

Tracy N. Mikuta
Managing Director of Compliance and IT
Piedmont Trust Company

11.00 am

Wrap Up

Becky Kelly
Executive Director
Trust Education Foundation, Inc.
Partner
Fiduciary Education Center, LLC



Relax at Pinehurst

The Forum will be held at the beautiful Pinehurst Resort in Pinehurst, North Carolina, which includes several distinguished hotels, golf courses, a world class spa, tennis courts, pools, and dining venues. Forum attendees receive discounted room rates. To learn more, visit www.pinehurst.com.

Please see the "Pinehurst Reservation Form" section in this book. Complete and submit the hotel reservation form by Thursday, January 25, 2018.

REGISTER TODAY

The conference is limited to 300 attendees, so register early to avoid disappointment and to secure your preferred accommodations.

The registration deadline is Friday, February 16, 2018. The \$645 registration fee includes breakfast and lunch daily, receptions on Sunday and Monday evenings, refreshments served at breaks, program materials, and a certificate of attendance (hotel costs are not included). Major credit cards are accepted for payment.

For faster processing, we encourage you to complete the registration form and pay by credit card online at: www.trustededucationfoundation.com. As another option, you may submit your registration form and payment by check (\$645) by mail to: Trust Education Foundation, Inc., Campbell University, P.O. Box 218, Buies Creek, NC 27506. Please make checks payable to the Trust Education Foundation.

MAKE YOUR PINEHURST RESERVATIONS

Reserve your room early. Complete the hotel registration form in this booklet and submit it to Pinehurst as soon as possible; the reservation deadline is Thursday, January 25, 2018. The form can be faxed to 1-910-235-8240 or mailed to: Group Reservations, Pinehurst, P.O. Box 4000, Pinehurst, NC 28374-4000.

Consider your dates of stay. The Forum begins at 5:00 pm on Sunday, February 25, and ends at 11:00 am on Wednesday, February 28. Hotel check-in time is 4 pm, and checkout time is noon. Pinehurst will be happy to extend your stay (subject to availability) at the same room rate, for up to three days before or three days after the Forum. On the hotel reservation form, be sure to indicate if your arrival and departure dates will be extended.

Plan your trip. Transportation to and from the conference is YOUR responsibility. If you plan to fly, Pinehurst is accessible from several NC airports, including Fayetteville, Raleigh/Durham, Greensboro, and Charlotte. If you plan to drive, directions are available from Pinehurst. Contact the resort at 1-855-295-9940 or visit www.pinehurst.com.

CONTACT US WITH QUESTIONS

We're here to ensure you have a pleasant forum experience. Contact us if you need assistance.

- ▶ Hotel registration – Pinehurst Resort, 1-855-295-9940
- ▶ Sponsorship opportunities – Becky Kelly, kellytrust@comcast.net
- ▶ General questions and continuing education credits – Jimmy Witherspoon, Campbell University, witherspoon@campbell.edu, or 1-910-893-1387

27TH ANNUAL
TRUST ADVISORS FORUM
Pinehurst Resort, NC | February 25 - 28, 2018

Registration Form

Please complete the form below in order to register for the 27th Annual Trust Advisors Forum at the Pinehurst Resort, NC.

**For faster processing, we recommend you submit this form
and pay online at: www.trustededucationfoundation.com**

You may also submit this registration form and payment by check (\$645) by mail to: Trust Education Foundation, Inc.,
Campbell University, P.O. Box 218, Buies Creek, NC 27506. Please make checks payable to the Trust Education
Foundation.

Name: _____
Last First Middle Initial

Title: _____

Firm or Institution: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Nickname (for badge): _____

Business Telephone: _____ E-mail Address: _____

Circle Designations Held: CTFA CRSP CFP Other _____

Please provide CFP ID# and Name as it appears on the CFP database.

CFP ID# _____ CTFA/CRSP ID# _____

Pricing Info: \$645 Full registration cost

Mailing Address: Trust Education Foundation, Inc.
Campbell University
PO Box 218
Buies Creek, NC 27506

Please make checks payable to: Trust Education Foundation Inc.

Please detach applications along dotted line.



Campbell University / Trust Education Foundation
27th Annual Trust Advisors Forum
February 25 - February 28, 2018 | Booking ID #53973



We look forward to welcoming you to Pinehurst! Reservations will be accepted until Thursday, January 25, 2018 or until the group block is full, whichever comes first. Pinehurst consists of a variety of accommodations including the Carolina, Villas, Holly Inn, The Manor Inn and Condominiums. The resort will make every effort to honor specific room requests. If your request is not available, the best substitution will be made.

DAILY RATES: [EP Plan](#) **LOCATION:** [Carolina Hotel, Holly Inn, Villa Specific](#)

*Should the number of group room reservations exceed what has been contracted for the Carolina, Holly, or Villas, Pinehurst may need to place the additional reservations requests in other lodging accommodations within the Resort.

GROUP RATES:

Please indicate the number of adults in the room: _____ \$171.00 per room, per night
Rates are per room, per night and include your accommodations

Arrival Date _____ Departure Date _____

Check-In Time: 4:00 PM - Check-Out Time: 12:00 NOON

RESORT SERVICE FEE & STATE SALES TAX: A 10% resort service fee will be added to your account. State sales tax of 6.75% and occupancy tax of 3% are additional.

DEPOSIT AND CANCELLATION POLICY: A deposit representing one night's rate per person is charged at the time the reservation is made. Pinehurst must receive notice of any cancellation at least 30 days prior to date of arrival in order to refund a deposit.

Please complete and fax or mail with deposit to:
FAX: 910-235-8240
PHONE: 1-855-295-9940

PINEHURST RESORT: ATTN GROUP RESERVATIONS
PO BOX 4000
VILLAGE OF PINEHURST, NC 28374-4000

ROOMS TO BE OCCUPIED BY: (Type or Print all names)

Name	Address	City	State	Zip
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Cell Phone (____) _____	Business Phone (____) _____	E-Mail _____
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CREDIT CARD INFORMATION TO GUARANTEE RESERVATION:

Credit Card Number _____ Expiration Date ____/____ Security Code _____

Card Holder Name _____

Card Holder Authorized Signature: _____

This signature gives Pinehurst Resort permission to charge a deposit and/or balance to the credit card number provided.

Is the Credit Card for both Guests? Yes or No (Please Circle)

Will the Guest have the credit card with them at check-in? Yes or No (Please Circle)

Is the Credit Card for final payment? Yes or No (Please Circle)

If Yes, will incidentals be charged to this card? Yes or No (Please Circle)



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School of Business

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Campbell University
Post Office Box 218
Butes Creek, NC 27506