

28TH ANNUAL TRUST ADVISORS FORUM

Pinehurst Resort, NC | February 24 - 27, 2019



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CHOOSING YOUR BEST STRATEGY





WELCOME TO THE FORUM

Dear Colleague:

I'm delighted to announce the 2019 Trust Advisors Forum will be held February 24 - 27, 2019 at the fabulous Pinehurst Resort in North Carolina! Now in its 28th 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 2019!

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 24, 2019

3:00 pm – 6:00 pm

Forum Registration

6:00 pm – 7:30 pm

Opening Session Reception & Cocktail Party
Cardinal Room

Patrick Alyward- 2019 President
Trust Education Foundation, Inc.
President
RIC

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 25, 2019

Breakfast Buffet
Carolina Dining Room

8:00 am – 10:00 am

Hot Topics in Estate Planning

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

Elinor J. Foy, Esquire
Of Counsel
Womble Bond Dickinson (US) LLP

10:00 am – 10:30 am

Break and Exhibits
Cardinal Room

10:30 am – 11:15 am

The Foundation, Campbell University and Student Introductions

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

Phillip Strickland - Member, TEF Board
Senior Vice President / Manager of Institutional Trust
First Citizens Bank

Emily Bratton
Trust Officer
U.S. Trust

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 / Fiduciary Management Services Director
Wells Fargo

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

Panelists:

Manuel (Manny) F. Perez-Carrillo
Executive Vice President / Head of Trust and Fiduciary Administration
Private Wealth Management
SunTrust Banks, Inc.

Jeanne Adam
Senior Vice President / Managing Director
Fiduciary Management Services
Wells Fargo Wealth Management

Alma D. Banuelos
National Head of Trust and Estate Services
CNB & RBC

2:00 pm - 3:00 pm

Regulatory Update

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

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 Opioid Challenge for Fiduciaries

Kevin L. Johns, Esquire
Partner
Wyatt, Tarrant & Combs

6:00 pm - 8:00 pm

Reception & Cocktail Party

Cardinal Room

Dining on your own



Day Two

Tuesday, February 26, 2019

6:30 am - 8:00 am

Breakfast Buffet
Carolina Dining Room

8:00 am - 9:30 am

Issues that Arise with Grantor Trusts

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

Unleashing Generosity: Charitable Gift Planning in 2019

Michael King, Esquire
Vice President - Gift Planning Services
National Christian Foundation (NCF)

11:00 am - 12:00 pm

Is Millennial a Four-Letter Word

Ryan P. Layton, CFA
Wealth Strategist
EmeraldSpark Investments

12:00 pm - 1:30 pm

Lunch
Carolina Hall

1:30 pm - 2:30 pm

Getting Smarter About Cybersecurity and Data Privacy

Gary Sorrentino
Managing Director
JP Morgan Chase

2:30 pm - 3:30pm

Investing in Volatile Markets

Tom McKinstry, CFA
Chief Investment Officer
MainStreet Advisors

3:30 pm - 7:00 pm

Dining on your own



Day Three

Wednesday, February 27, 2019

6:30 am - 8:00 am

Breakfast Buffet
Carolina Dining Room

8:00 am – 9:30 am

The Latest Developments in ILITS

Maria Sturges - Moderator
Vice President of Outsourcing Operations
Infovisa Wealth Services, LLC

Panelists:

Tate Groom
Managing Partner
LifeTrust3D

Greg Kizer
Vice President of Marketing
RIC

9:30 am - 11:00 am

Compliance and Risk Management Panel

Patrick Alyward - Moderator
President
RIC

Panelists:

Sean Gray
Chief Compliance Officer/CCO and Chief Risk Officer/CRO
Bessemer Trust

David Bilko
Executive Vice President / Chief Risk Officer
Union Bank & Trust

Neil Archibald
General Counsel / Chief Fiduciary Officer
Member's Trust

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 24, 2019.

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 19, 2019. 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 24, 2019. 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 24, and ends at 11:00 am on Wednesday, February 27. 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

28TH ANNUAL
TRUST ADVISORS FORUM
Pinehurst Resort, NC | February 24 - 27, 2019

Registration Form

Please complete the form below in order to register for the 28th 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.



Campbell University
2019 Trust Advisors Forum | Booking ID #61376
 Friday February 22 - Wednesday February 27, 2019



We look forward to welcoming you to Pinehurst! Reservations will be accepted until January 24th 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 Accommodations*](#)

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

GROUP RATES - (Please Check Desired Occupancy)

Please indicate the number of adults in the room: _____ \$179.00 per room, per night

Rates are per room, per night and include your accommodations

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.

Reservations may be made via email, phone, fax, or mail:

Email:	Group.Reservations@pinehurst.com	PINEHURST RESORT: ATTN GROUP RESERVATIONS
Toll-Free:	(800) 487-4653	PO BOX 4000
Fax:	(910) 235-8240	VILLAGE OF PINEHURST, NC 28374-4000

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

Name _____	Address _____	City _____	State _____
Zip _____			
Cell Phone (____) _____	Business Phone (____) _____	E-Mail _____	

SHARING ROOM WITH:

Name _____	Address _____	City _____	State _____
Zip _____			
Cell Phone (____) _____	Business Phone (____) _____	E-Mail _____	

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)

If No, is the Credit Card for final payment? Yes or No (Please circle)

Will incidentals be charged to this card? Yes or No (Please Circle)



Lundy-Fetterman

School of Business

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Campbell University
Post Office Box 218
Butes Creek, NC 27506