52ND
ANNUAL
SESSION

TRUST ADVISORS INSTITUTE

Continuing education and professional development for the financial services industry

FIDUCIARY FUNDAMENTALS, May 29-June 4, 2020

ADVANCED PRACTICES, June 4-7, 2020

Leads to ATFA Certification

ENRICH. EXPAND. GROW.

CAMPBELL UNIVERSITY | BUIES CREEK, NC | 27506

Dear Colleague:

We are proud to introduce the Trust Advisors Institute (TAI) to the financial services industry. TAI is a wonderful educational opportunity for you or for your colleagues and employees in banking, credit unions, trust and investment companies, RIAs, supervisory agencies or elsewhere within the profession of being a well-versed fiduciary.

Campbell University has been the leading academic institution in the nation in the field of trust and wealth management for over 50 years. In addition to offering both undergraduate and graduate degrees in trust and wealth management, we made a strong commitment in 1969 to provide the highest quality continuing education programs to the industry. Literally thousands of trust bankers from all around the country have attended the Southeastern Trust School formerly offered by Campbell. They have carried that gained knowledge and expertise with them throughout their successful careers. Today, we are launching a two-part program even better able to meet your specific needs and goals: Trust Advisors Institute—Fiduciary Fundamentals and Advanced Practices. Successful completion of the Advanced Practices program will also lead to the Accredited Trust and Fiduciary Advisor (ATFA) certification held by over 1,000 fiduciaries nationwide and offered to the industry by Campbell University.

TRUST ADVISORS INSTITUTE – FIDUCIARY FUNDAMENTALS The Fiduciary Fundamentals program is designed to provide the participant the "big picture" with a very strong grounding in fiduciary law, taxation, financial planning, estate planning, investments, employees benefits, IRA's, compliance, operations, the management of specialty assets and sales.

TRUST ADVISORS INSTITUTE – ADVANCED PRACTICES The Advanced Practices program builds on expertise acquired in the Fiduciary Fundamentals Program focusing on advanced comprehensive case analysis; the latest in tax planning strategies; risk management and compliance issues and advanced investment planning strategies.

ACCREDITED TRUST AND FINANCIAL ADVISOR (ATFA) CERTIFICATION Trust Advisors Institute leads to being awarded the ATFA certification by Campbell University. Students must complete BOTH the Fiduciary Fundamentals AND the Advanced Practices programs to be eligible to sit for the ATFA certification examination. Fiduciary Fundamentals and Advanced Practices are offered back-to-back requiring the applicant to only be away from the office for one week.

TAI takes place May 29 - June 7, 2020 and is limited to 80 students. The program's small classroom size allows students to participate fully and receive personalized attention while also net-working at social and recreational events.

This brochure explains the program in detail, but here are the key reasons to consider TAI and ATFA certification:

INCREDIBLE VALUE. *The $1,695 registration fee for Fiduciary Fundamentals and $900 registration fee for Advanced Practices ($2,495 if you register for both Fiduciary Fundamentals and Advanced Practices) includes classroom and workshop hours, lodging, meals and the the ATFA certification application and examination fees—making it an incredible value versus other professional development conferences and fiduciary certification programs.*

CONTINUING EDUCATION CREDITS. *Graduates of TAI Fiduciary Fundamentals are eligible to receive 28 hours of CFP credit.*

ATFA CERTIFICATION *demonstrates the very highest level of expertise, proficiency and skill as a fiduciary to your clients and within the profession.*

Please review the brochure to learn more and to register for the program option that best suits your needs. We look forward to meeting you at Trust Advisors Institute this summer!

Sincerely,

Jimmy Witherspoon

Jimmy Witherspoon
Chairman
Department of Trust and Wealth Management
Campbell University
910-893-1387
witherspoon@campbell.edu

INTRODUCTION

THE TRUST ADVISORS INSTITUTE (TAI) TRADITION

FOR OVER FIVE DECADES, TRUST ADVISORS INSTITUTE (TAI) AND CAMPBELL UNIVERSITY HAVE HELPED THOUSANDS OF THE NATION'S TRUST AND WEALTH MANAGEMENT PROFESSIONALS TO ENRICH THEIR KNOWLEDGE, EXPAND THEIR CAREERS AND GROW THEIR INSTITUTIONS.

TAI is an exceptional educational opportunity—whether you're a seasoned veteran looking to "brush up" on current practices and policies, or a newcomer seeking a comprehensive overview of the issues in your field.

As its name suggests, TAI originated as a program for bank trust officers, and it retains a strong focus on the fiduciary side of the trust and wealth management industry. It also offers value to managers and other employees of investment firms, trust companies, credit unions, RIA's, accounting and law firms, retirement plan providers, supervisory agencies and non-profit administrators.

TAI is sponsored by Campbell University and the Trust Education Foundation, Inc., national leaders in trust and wealth management education. To find out more about Campbell's Trust and Wealth Management degree programs and the Foundation please visit **www.trusteducationfoundation.com**. Here are the reasons why TAI is special:

CUSTOM DESIGNED AND PERSONALIZED TO MEET YOUR NEEDS AND CAREER GOALS...

TAI PART 1

Applicants MAY chose to enroll in the **FIDUCIARY FUNDAMENTALS PROGRAM ONLY**. Fiduciary Fundamentals is well suited to provide the student the "big picture" at a very high level as to law, tax, estate planning, financial planning, investments, trust and estate administration, employee benefits, compliance, operations and sales. Fiduciary Fundamentals is the equivalent of Southeastern Trust School formerly offered by Campbell University.

TAI PART 2

Qualified applicants interested in more advanced training MAY chose to enroll in the **ADVANCED PRACTICES PROGRAM ONLY**. Graduates of the Fiduciary Fundamentals (formerly Southeastern Trust School); or an equivalent foundational trust education program are eligible to enroll in the Advanced Practices program bypassing Fiduciary Fundamentals. **The ATFA certification examination** will be offered the last day of the Advanced Practices program.

BOTH PARTS

Interested applicants MAY and are also ENCOURAGED to enroll in **BOTH THE FIDUCIARY FUNDAMENTALS AND ADVANCED PRACTICES PROGRAMS**. Fiduciary Fundamentals and Advanced Practices are offered "back to back". Upon successfully completing the Fiduciary Fundamentals examination, students advance into the Advanced Practices program and sessions. The **ATFA certification examination** will be offered the last day of the Advanced Practices program.

THE APPLICATION DEADLINE IS MAY 15, but early application is encouraged since the program is limited to 80 students. Use the enclosed form, or register online at **www.trusteducationfoundation.com**.

We hope this brochure tells you everything you need to know about TAI, but if you have questions please contact **Mr. Jimmy Witherspoon, TAI Director, at 910-893-1387 or witherspoon@campbell.edu.**

GENERAL INFORMATION

APPLICATIONS MUST BE RECEIVED BY MAY 15.
You may register and pay online at **www.trusteducationfoundation.com.**

ELIGIBILITY

TAI is open to professionals from a variety of institutions, including but not limited to banks, trust and investment companies, credit unions, supervisory agencies, accounting firms, law firms, financial planning companies, RIA's, retirement plan providers, benefits administrators and non-profit administrators.

APPLICATION

Because TAI is limited to 80 students, early application is encouraged. Each candidate must complete an application form (see pp. 7-8; or apply online at **www.trusteducationfoundation.com**).
To be considered, each applicant must have his/her manager sign the form. Admissions decisions are made by the TAI / ATFA Advisory Committee.
Applications must be received by May 15.

COST

The total cost for Trust Advisors Institute – Fiduciary Fundamentals is $1,695, which includes tuition, room and board and classroom materials. The total cost for Trust Advisors Institute – Advanced Practices which includes tuition, room and board, classroom materials and the ATFA examination is $900. The total cost for both programs is $2,495.

You may register and pay online online at www.trusteducationfoundation.com.

CANCELLATION POLICY

Cancellations received after May 15 will be refunded the application fee minus $100 to cover the cost of materials and handling.

PLEASANT & COMFORTABLE SETTING

LOCATION

Trust Advisors Institute is held on the Campbell University campus in Buies Creek, North Carolina, 30 miles south of Raleigh. Campbell offers a quiet and pleasant atmosphere for both study and recreation.
The Campbell campus is located on Highway 421, four miles east of the intersection with Highway 401.
If traveling by air, fly into Raleigh/Durham International Airport (RDU), which is located approximately 45 miles from campus. A limited number of pickups from the airport are available through TAI; contact Jimmy Witherspoon by May 20 at 910-893-1387 or witherspoon@campbell.edu

ACCOMMODATIONS

TAI students will stay in Luby Wood Hall, constructed in 2017. All students will be assigned to a private room with a private bathroom.

TAI STUDENTS STAY IN LUBY WOOD HALL ON CAMPUS (SHOWN ABOVE AND BELOW LEFT).

MEALS
All meal costs are covered in the program fee. Group dinners off campus are scheduled on May 30, June 2. and June 5. All other meals are served in a private dining room in Campbell's newly opened Student Union.

CLASS SESSIONS
All classes will be held in state-of-the-art classrooms in the Lundy-Fetterman School of Business. Students will also have access to the First Citizens Bank Wealth Management Center while on campus.

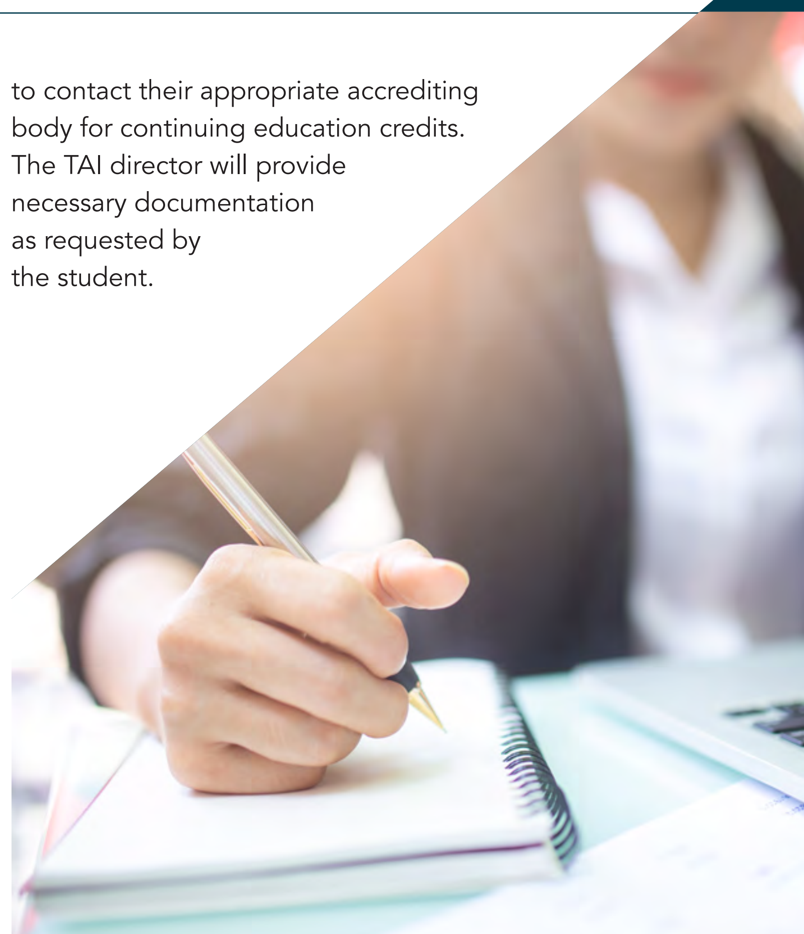
ATTIRE
Casual attire is appropriate for TAI.

RECREATION
Facilities for golf, tennis, softball, swimming, fishing and jogging are available. Students should bring their own sports equipment and clothing.

VALUABLE CAREER CREDENTIALS

ACCREDITATION
Each student who completes the Trust Advisors Institute – Fiduciary Fundamentals requirements receives a certificate issued jointly by TAI and Campbell University. Each student who completes the Trust Advisors Institute – Advanced Practices requirements will be granted the ATFA Certification by TAI and by Campbell University. There are ongoing annual renewal fees and CE requirements to maintain the certification.

CONTINUING EDUCATION CREDITS
Graduates of Trust Advisors Institute – Fiduciary Fundamentals holding the CFP certification will receive 28 hours of continuing education credit. Attorneys, licensed insurance professionals and CPAs graduating from TAI may be eligible for continuing education credits depending on the requirements in their jurisdiction. Students holding the CISP; CTFA; CRSP; CFIRS; CFSA or NASD Series 6, 7, or 63 designations—as well as CPAs seeking CPE hours, or attorneys seeking CLE hours—are encouraged, upon graduation, to contact their appropriate accrediting body for continuing education credits. The TAI director will provide necessary documentation as requested by the student.



GENERAL INFORMATION

BASIC PROGRAM REQUIREMENTS

ATTENDANCE
Attendance at all Trust Advisors Institute classes and workshops (including commencement) is required. Students who miss these sessions without a prior excuse will not receive a certificate or continuing education credits.

HOMEWORK
No homework is assigned; all work is completed in classes or workshops. Students will need, however, to study on their own time for the final exam offered at the conclusion of the Fiduciary Fundamentals program and the ATFA certification examination offered at the conclusion of the Advanced Practices program.

FIDUCIARY FUNDAMENTALS EXAM & CERTIFICATE
On the morning of the last day of the Fiduciary Fundamentals program, each student must complete a written examination on the topics covered in TAI. Exam results are available that morning. Students who successfully complete the exam receive a certificate.

FIDUCIARY FUNDAMENTALS COMMENCEMENT
Examination results are provided at commencement, which is presided over by the TAI dean and TAI class president. A certificate is awarded to the candidates who successfully meet the graduation requirements.

ATFA EXAM
On the morning of the last day of the Advanced Practices program, each student must complete a written examination on the topics covered in TAI. Exam results will be provided electronically the next week. Students who successfully complete the exam receive the ATFA certification. It should be noted there are ongoing CE requirements and an annual renewal fee required to maintain the certification.

PROUD SPONSORSHIP

CAMPBELL UNIVERSITY
Campbell University offers the nation's only undergraduate degree program in trust and wealth management. Institutions such as Bank of America, Wells Fargo, JP Morgan, Truist Bank and Trust, City National , Merrill Lynch Trust, and First Citizens Bank actively recruit Campbell trust program students for permanent positions and summer internships. Campbell is the third-largest private university in North Carolina, located in the heart of the state's booming research triangle area. Visit www.campbell.edu to learn more.

THE TRUST EDUCATION FOUNDATION
The Trust Education Foundation, Inc., was established to ensure that Campbell's trust and wealth management academic programs keep pace with the changing needs of trust institutions and the financial services industry. The Foundation sponsors continuing education programs such as the Trust Advisors Forum to assist students and professionals in these fields. Financial institutions nationwide contribute to the foundation, reviewing curricula, establishing scholarships and sponsoring executive education sessions. The Foundation's board of directors includes 40 representatives from leading firms.

Visit **www.trusteducationfoundation.com** to learn more.

THE TRUST EDUCATION FOUNDATION, INC., WAS ESTABLISHED TO ENSURE THAT CAMPBELL'S TRUST AND WEALTH MANAGEMENT ACADEMIC PROGRAMS KEEP PACE WITH THE CHANGING NEEDS OF TRUST INSTITUTIONS AND THE FINANCIAL SERVICE INDUSTRY.

TRUST ADVISORS INSTITUTE

FIDUCIARY FUNDAMENTALS
CURRICULUM & PROGRAM SCHEDULE

IN JUST ONE WEEK, TAI STUDENTS GAIN UP-TO-DATE INFORMATION ON—AND AN IN-DEPTH UNDERSTANDING OF— MANY FINANCIAL AND LEGAL TOPICS

PERTINENT TOPICS

Fiduciary Fundamentals covers 11 topics of interest to professionals throughout the financial services industry. In just one week, TAI students gain up-to-date information on—and an in-depth understanding of—many financial and legal topics. The program balances classroom time with study, discussion and recreational opportunities, as well as social events for students and faculty.

COMPLIANCE
Discussion of the audit function, formal examinations including the trust rating system and the compliance function.

ESTATE PLANNING
Integrated analysis of the estate planning process covering probate avoidance, property ownership, wills, trusts, powers of appointment, estate tax, charitable transfers and more.

ETHICS
The unauthorized practice of law, confidentiality, breach of trust, self-dealing issues relating to unfair trading of securities, conflict of interest and the prudent person standard are addressed as core components in all TAI sessions. Topic also can be covered in a separate class.

FIDUCIARY LAW
Analysis of fiduciary principles and the substantive law of trusts. Analysis includes fiduciary powers, duties and liability as well as regulatory provisions affecting the fiduciary business.

FINANCIAL PLANNING
In-depth analysis of the financial planning process, from data gathering through analysis, implementation and monitoring.

INVESTMENTS
Overview of the investment process for equities, fixed income and real estate. Discussion includes technical analysis, security trading and key investment concepts (asset allocation, diversification, risk and return).

EMPLOYEE BENEFITS / IRAs
Discussion of Employee Benefits Accounts and Individual Retirement Accounts and their role in financial and estate planning, including required distributions during the lifetime and after death. Additionally, we will cover beneficiary options and QTip opportunities as well as use by future generations.

OPERATIONS/MANAGEMENT OF SPECIALTY ASSETS
Overview of personal and corporate trust operations, including accounting, insurance, securities processing and real estate. Includes analysis of asset management, purchases and sales, Regulation 9 and other topics.

SELLING/RELATIONSHIP MANAGEMENT
Overview of trust services and the elements of a successful client relationship and sales effort. Discussion of sales calls as well as the competitive environment.

TAXATION
Study of taxation issues in a fiduciary context: estate tax, gift tax, generation skipping tax and special valuation rules. Case study integrates the various concepts.

TRUST AND ESTATE ADMINISTRATION
Review of the characteristics of trust business. Discussion includes estate administration, the various types of trusts and agency accounts, guardianship and powers of attorney issues.

FIDUCIARY FUNDAMENTALS FULL SCHEDULE

	FRIDAY MAY 29	SATURDAY MAY 30	SUNDAY MAY 31	MONDAY JUNE 1	TUESDAY JUNE 2	WEDNESDAY JUNE 3	THURSDAY JUNE 4
MORNING		Fiduciary Law	Fiduciary Law Taxation	Financial Planning Estate Planning	Investments	Trust Administration Workshop Employee Benefits and IRAs	Trust Advisors Institute Exam Commencement
AFTERNOON	Registration and Check-in	Lunch Taxation	Lunch Taxation Workshop Financial Planning	Lunch Estate Planning Estate Planning Workshop	Lunch Trust Administration	Lunch Operations / Management of Specialty Assets / Compliance Selling/Relationship Management	Lunch **ADVANCED PRACTICES** Begins
EVENING	Reception Dinner Orientation	Recreation and Study Period Dinner Off Campus Durham Bulls game	Recreation and Study Period Dinner Financial Planning	Recreation and Study Period Dinner Investments	Recreation and Study Period Dinner Off Campus Narron Home Dinner	Recreation and Study Period Dinner	

TRUST ADVISORS INSTITUTE

ADVANCED PRACTICES
CURRICULUM & PROGRAM SCHEDULE

THE ADVANCED PRACTICES PROGRAM BUILDS ON EXPERTISE ACQUIRED IN THE FIDUCIARY FUNDAMENTALS PROGRAM

PERTINENT TOPICS

Advanced Practices covers 9 complex topics of interest to seasoned professionals throughout the financial services industry.

ADVANCED CASE PLANNING SCENARIOS
Putting what you have learned into action, with a variety of real-life fiduciary situations. This class will be done in a group setting.

ADVANCED ESTATE AND GIFT PLANNING STRATEGIES
Negative estate and gift tax consequences can be disastrous for your client. The class delves deeper into options for your clients. You will learn how to put family situation and estate tax avoidance together.

ADVANCED INVESTMENT ANALYSIS
Stocks, bonds, mutual funds and more esoteric assets are discussed as well as unique assets. Additionally, fiscal and monetary policy issues are covered as well as the responsibilities of portfolio management in the fiduciary world.

ADVANCED TAXATION SEMINAR
This session involves a myriad of options regarding gifts for a variety of different situations for both individuals and charities. Generation skipping, transfers to irrevocable trusts, and marital trust options are discussed. Also discussed are the use of disclaimers and what to do taxwise with a closely held business.

DOCUMENT INTERPRETATION
You will take real life documents done by famous people and critique the associated issues. This class is done in a group setting.

FIDUCIARY INCOME TAXATION PLANNING STRATEGIES
With less than 1% of the population needing an estate tax return, the opportunities for tax savings in fiduciary income tax become even more important. Learn, in depth, the options you have to save your client fiduciary income tax dollars.

FIDUCIARY LAW SEMINAR
Discussed will be a variety of Uniform Acts that affect us all, Collective Funds, transactions between trusts, environmental risk, what should be part of the account acceptance process, Enterprise Wide Risk Management and ethical issues that can create liability.

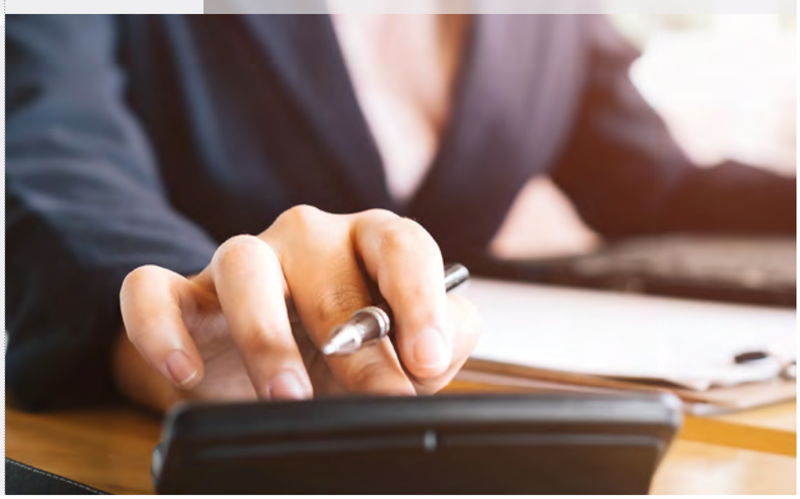
INSURANCE AND RISK MANAGEMENT
This course discusses a plethora of types of insurance and annuities and when they apply.

REGULATORY AND COMPLIANCE MATTERS
This course will discuss the regulatory and compliance process and how they should work side by side with your trust department and staff auditor.

ADVANCED PRACTICES FULL SCHEDULE

	THURSDAY JUNE 4	FRIDAY JUNE 5	SATURDAY JUNE 6	SUNDAY JUNE 7
MORNING	**FIDUCIARY FUNDAMENTALS** Concludes	Advanced Taxation Seminar Fiduciary Law Seminar	Insurance and Risk Management Advanced Investment Analysis	ATFA Exam
AFTERNOON	Lunch Estate and Gift Taxation Planning Strategies Fiduciary Income Taxation Planning Strategies	Lunch Fiduciary Law Seminar Regulatory and Compliance Matters	Lunch Advanced Case Planning Scenarios ATFA Exam Review	
EVENING	Recreation and Study Period Dinner Document Interpretation	Recreation and Study Period Dinner Off Campus	Dinner	

The Advanced Practices program builds on expertise acquired in the Fiduciary Fundamentals Program focusing on advanced comprehensive case analysis; the latest in tax planning strategies; risk management and compliance issues and advanced investment planning strategies.



Why should you acquire ATFA Certification?

ATFA
ACCREDITED TRUST FINANCIAL ADVISOR

CAMPBELL UNIVERSITY is proud to offer the ATFA Certification to the financial services industry and to fiduciaries nationwide. Over 1,000 trust professionals have acquired the ATFA Certification over the last decade and it is quickly becoming a new "Gold Standard" for true fiduciaries.

The ATFA Certification is available to ALL fiduciaries whether they are serving their clients with banks, credit unions, independent trust companies, broker affiliated trust companies, wealth advisory firms or law firms offering trust services. In an increasingly complex, litigious and regulatory environment, never has the need been greater for trust professionals well versed in, and with a demonstrated mastery of, the very highest level of fiduciary expertise. A trust professional holding the ATFA Certification will, in every sense have demonstrated that they are ready to face those challenges.

CAREER ADVANCEMENT

Set yourself apart with a gold standard of professional expertise in the trust industry. Learn more about the value of the ATFA certification to you and your institution.

CONTINUING EDUCATION DEVELOPMENT

The ongoing CE requirements of the ATFA certification program can easily be maintained by attending the Trust Advisors Forum at Pinehurst. The Forum is offered by the Trust Education Foundation, Inc. and is the nation's premier trust conference. Information about the Forum can be found at **www.trusteducationfoundation.com**

A CERTIFICATION PROGRAM SPECIFICALLY GEARED TO MEET THE NEEDS OF TODAY'S FIDUCIARIES

The primary focus of the ATFA certification is proudly and unwaveringly on the fiduciary side of the business…with all of its challenges and opportunities.

AFFORDABLE INVESTMENT IN YOUR FUTURE AND THE FUTURE OF THE INDUSTRY

The intentionally modest fees are not only affordable, but you will also be making an important investment in the future of the industry. The fees associated with ATFA and Trust Advisors Institute will flow into trust scholarships for the students majoring in trust and wealth management at Campbell.

TRUST ADVISORS INSTITUTE APPLICATION FORM

SPONSORED BY CAMPBELL UNIVERSITY

YOU MAY ALSO REGISTER ONLINE AT WWW.TRUSTEDUCATIONFOUNDATION.COM

☐ **Ms.** ☐ **Mrs.** ☐ **Mr.**

Name ____
Last First Middle

Name by which you wish to be called ______________________________

E-mail address ____

☐ Officer ☐ Non-Officer **Company Name** ______________________________

Business Mailing Address ____

City ______________________ **State** ______________ **Zip** __________

Title or Position ____

Business Phone ____

Type of Business *(check one)* ☐ Trust Department ☐ Credit Union ☐ Non Profit ☐ Investment Advisor ☐ RIA

☐ Law, Accounting or Tax Firm ☐ Employee Benefit Company

☐ CFP ID Number ______________________ ☐ Other ID Number ______________________

Certifications/Designations/Licenses

____

____

List any financial services courses completed:

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TRUST ADVISORS INSTITUTE APPLICATION FORM

SPONSORED BY CAMPBELL UNIVERSITY

In applying for this school, I understand that I will be expected to live in assigned quarters, to attend all scheduled classroom and work periods during the session, to prepare all assigned work and otherwise to abide by the established standards of the school. To cover the total cost of room, board and tuition, I have:

☐ Enclosed is my check for $1,695 for
Trust Advisors Institute - FIDUCIARY FUNDAMENTALS only, *payable to Trust Advisors Institute*

☐ Enclosed is my check for $900 for
Trust Advisors Institute - ADVANCED PRACTICES only, *payable to Trust Advisors Institute*

☐ Enclosed is my check for $2,495 for BOTH PROGRAMS
Trust Advisors Institute - FIDUCIARY FUNDAMENTALS AND ADVANCED PRACTICES, *payable to Trust Advisors Institute*

RECOMMENDED BY:

____
(Manager or Name of other authorized signature)

Title____

IMPORTANT:

This application and accompanying check (payable to Trust Advisors Institute) should be mailed **no later than May 15, 2020**, to:

Trust Advisors Institute
Campbell University
P.O. Box 218
Buies Creek, NC 27506

Notice of cancellation must be received prior to May 15, 2020. Cancellations received after May 15 will be refunded the registration fee minus $100 to cover the cost of materials and handling.

YOU MAY ALSO REGISTER ONLINE AT WWW.TRUSTEDUCATIONFOUNDATION.COM

TALENTED TAI FACULTY

TAI INSTRUCTORS INCLUDE BANK EXECUTIVES, ATTORNEYS AND CPAS, AS WELL AS OTHER SPECIALISTS IN FINANCIAL AND LEGAL DISCIPLINES.

Our faculty are accomplished professionals with long tenures in their fields. They also are dedicated teachers with strong ties to Campbell University's trust and wealth management programs.

The TAI faculty develops the curriculum and leads all classroom/workshop sessions. They also attend meals and other social events with TAI students, who can benefit greatly from these mentoring and networking opportunities.

Tyler Britton
Professor
Campbell University
Buies Creek, North Carolina

David D. Butler
Professor
Campbell University
Buies Creek, North Carolina

L. McNeil Chestnut
Special Deputy Attorney General (Retired)
North Carolina
Department of Justice
Raleigh, North Carolina

Jessica Evans
Senior Vice President
SECU
Raleigh, North Carolina

Eliner J. Foy
Of Counsel
Womble Bond Dickinson (US) LLP
Raleigh, North Carolina

Sherwood C. "Chris" Henderson, CPC
Attorney
White and Allen
Kinston, North Carolina

John H. Hill
Member, Advisory Board
Wells Fargo
Winston-Salem,
North Carolina

Becky T. Kelly
Partner
Fiduciary Education Center, Inc.
Staunton, Virginia

Ryan A. Newkirk
Senior Vice President
Wells Fargo Private Bank
Greensboro,
North Carolina

Richard H. Newton
President
Newton and Associates
Raleigh, North Carolina

Phillip Strickland
Senior Vice President &
Manager of Institutional Administration
First Citizens Bank
Raleigh, North Carolina

Kenneth Swayze, Jr.
Senior Vice President (Retired)
First Citizens Bank
& Trust Co.
Hendersonville,
North Carolina

PROGRAM CONTACT

Questions about the program can be directed to:

Mr. Jimmy Witherspoon, TAI Director
Phone 910-893-1387
Fax 910-893-1930
Email witherspoon@campbell.edu
Mail
Trust Advisors Institute
Campbell University
PO Box 218
Buies Creek, NC
27506

TRUST ADVISORS INSTITUTE

Additional information about TAI, including online registration is available at **www.trusteducationfoundation.com**