

PINEHURST RESORT IS COMMITTED TO FOLLOWING  
COVID-19 GUIDELINES FOR YOUR SAFETY  
[HTTPS://WWW.PINEHURST.COM/COVID-19-RESPONSE](https://www.pinehurst.com/covid-19-response)



30TH ANNUAL

# TRUST ADVISORS FORUM

PINEHURST RESORT, NC  
FEBRUARY 21 - 24

2021



Choosing Your  
Best Strategy



Lundy-Fetterman  
School of Business





# WELCOME

## TO THE FORUM

Dear Colleague:

I'm delighted to announce the 2021 Trust Advisors Forum will be held February 21 - 24, 2021 at the fabulous Pinehurst Resort in North Carolina!

Now in its 30th 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 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](http://www.trusteducationfoundation.com).

Thank you for your interest in the Forum! See you in 2021!

Cordially,



Becky T. Kelly

Executive Director

Trust Education Foundation, Inc. of Campbell University

Partner

Fiduciary Education Center, LLC

# MEET THE SPONSORS

The Trust Education Foundation, Inc. and Campbell University are the primary sponsors of the 2021 Trust Advisors Forum.



TRUST EDUCATION  
*Foundation*

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

Lundy-Fetterman  
School of Business

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](http://www.trusteducationfoundation.com)  
and [www.campbell.edu](http://www.campbell.edu)  
for more information.

## EARN EDUCATION CREDITS

The Trust Education Foundation, Inc. sponsors the Trust Advisors Forum to meet the annual continuing education needs of trust and wealth managers. The program agenda is submitted each year for pre-approval for CTFA, CRSP, ATFA, and CFP® continuing education credit. 2021 Forum attendees are entitled to receive 16.5 hours of CFP®, 17 hours of CTFA, 9 hours of CRSP, 5.75 hours of CISP, and 17 hours of ATFA continuing education credits.

If a Forum participant holds certifications not listed above or is interested in receiving, for example, CLE or CPE credit, the Director will be delighted to provide the attendee with proof of attendance and with supporting documentation to enable the participant to submit the program on their own account to the appropriate accrediting body/agency for approval.

Questions may be directed to Jimmy Witherspoon at [witherspoon@campbell.edu](mailto:witherspoon@campbell.edu) or 910-893-1387.

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.

ABA Professional Certification is dedicated to promoting the highest standards of performance and ethics within the financial services industry.

# REGISTRATION

SUNDAY, FEBRUARY 21, 2021

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3:00 pm - 5:30 pm

Forum Registration

5:30 pm - 7:00 pm

Opening Session Reception & Cocktail Party

CAROLINA HALL

PATRICK ALYWARD  
Chairman  
Trust Education Foundation, Inc.  
President  
RIC

BECKY KELLY  
Executive Director  
Trust Education Foundation, Inc.  
Managing Partner  
Fiduciary Education Center, LLC

Dining on your own





6:30 am - 8:00 am

### Breakfast Buffet

CAROLINA DINING ROOM

8:00 am - 10:00 am

### Hot Topics in Estate Planning

CHARLES (SKIP) D. FOX, ESQUIRE  
Partner  
McGuireWoods, LLC

10:00 am - 10:30 am

### Break and Exhibits

CAROLINA HALL

10:30 am - 12:00 pm

### Management Panel - What We Have Learned in the Pandemic

RYAN A. NEWKIRK - MODERATOR  
Senior Vice President and Managing Director  
Wells Fargo Private Bank

Panelists:

REBECCA W. BROCK  
Fiduciary Executive, Private Wealth  
Management  
Truist, Inc.

GENE LEWIS  
Senior Vice President and Manager  
Trust Department  
First Citizens Bank

JASON NIELL  
Senior Vice President / Manager  
National Trust Administration  
City National Bank

12:00 pm - 1:30 pm

### Lunch

CAROLINA DINING ROOM

1:30 pm - 3:00 pm

### Economic and Market Outlook

LINDA A. DUESSEL CFA, CFP, CPA  
Senior Vice President  
Federated Hermes

3:00 pm - 3:30 pm

### Break and Exhibits

CAROLINA HALL

3:30 pm - 4:30 pm

### Regulatory Update

KARY A. MOORE, ESQUIRE  
Senior Corporate Counsel and Vice President  
Federated Hermes

5:30 pm - 7:00 pm

### Reception and Cocktail Party

CAROLINA HALL

Dining on your own

6:30 am - 8:30 am

### Breakfast Buffet

CAROLINA DINING ROOM

8:30 am - 9:30 am

### "The Results Are In: Where Do We Go From Here?"

CHRISTOPHER N. HEWITT  
ASSOCIATE  
Womble Bond Dickinson (US) LLP

9:30 am - 10:00 am

### Break and Exhibits

CAROLINA HALL

10:00 am - 11:00 am

### Drafting in the Dark - How to Build Flexibility into Estate Plans During Times of Uncertainty

ELIE J. FOY  
OF COUNSEL  
Womble Bond Dickinson (US) LLP

11:00 am - 12:00 pm

### The Brave New World of the "Gen Z" Beneficiary

PHILLIP STRICKLAND - MODERATOR  
Senior Vice President and Manager of  
Institutional Trust  
First Citizens Bank

Panelists:

AARON SCHNOOR  
Senior, SGA President  
Campbell University Trust & Wealth  
Management Program

BECKY KELLY  
Executive Director  
Trust Education Foundation, Inc.  
Partner  
Fiduciary Education Center, LLC

JOHN BINGHAM  
Senior Vice President / Business  
Development  
SS&C Innovest

12:00 pm - 1:30 pm

### Lunch

CAROLINA DINING ROOM

1:30 pm - 2:30 pm

### Health Savings Accounts ("HSAs") As Valuable Tools for Financial & Retirement Planning

JASON M. COGDILL  
Attorney at Law

2:30 pm - 3:30 pm

### Capturing ESG and Financial Sustainability

EMILY LAWRENCE  
Senior Product Specialist for ESG  
Northern Trust

3:30 pm - 7:00 pm

Dining on your own



DAY 3

WEDNESDAY, FEBRUARY 24, 2021

6:30 am - 8:00 am

### Breakfast Buffet

CAROLINA DINING ROOM

8:00 am - 9:30 am

### Family Businesses - Succession and Monetization Strategies

J. LEE LLOYD

Senior Advisor, Mergers and Acquisitions/Corporate Finance

J. Lee Lloyd, LLC

9:30 am - 11:00 am

### Compliance and Risk Management

BRIAN MORROW

Fiduciary Risk and Compliance Consultant

JOHN CLARK

Fiduciary Risk and Compliance Consultant

11:00 am

### Wrap Up

BECKY KELLY

Executive Director

Trust Education Foundation, Inc.

Partner

Fiduciary Education Center, LLC



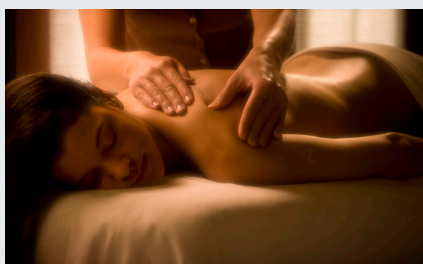


# REGISTER TODAY

## 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](http://www.pinehurst.com).

Please see the "Pinehurst Reservation Form" section in this book. Complete and submit the hotel reservation form by Wednesday January 20, 2021.



Due to COVID-19, we will be limiting the number of attendees, so register early to avoid disappointment.

The registration deadline is Friday, February 19, 2021. The \$745 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](http://www.trustededucationfoundation.com). As another option, you may submit your registration form and payment by check (\$745) 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 Wednesday, January 20, 2021. 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 5:30 pm on Sunday, February 21, and ends at 11:00 am on Wednesday, February 24. Hotel check-in time is 4 pm, and checkout time is 10:00 am. 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](http://www.pinehurst.com).

**COVID-19 RESPONSE:** Pinehurst Resort is committed to following COVID-19 guidelines for your safety. Visit <https://www.pinehurst.com/covid-19-response> for details.

### 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](mailto:kellytrust@comcast.net)
- General questions and continuing education credits: Jimmy Witherspoon, Campbell University, [witherspoon@campbell.edu](mailto:witherspoon@campbell.edu), or 1-910-893-1387



# TRUST ADVISORS FORUM

Pinehurst Resort, NC | February 21 - 24, 2021

## REGISTRATION FORM

Please complete the form below in order to register for the 30th 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](http://www.trustededucationfoundation.com)

You may also submit this registration form  
and payment by check (\$745) 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 ATFA Other \_\_\_\_\_

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

CFP ID# \_\_\_\_\_ CTFA/CRSP ID# \_\_\_\_\_

**PRICING INFO:** \$745 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.





WEALTH MANAGEMENT  
INSIGHTS

BUSINESS DEVELOPMENT STRATEGIES

EXCHANGE INFORMATION  
AND IDEAS

TIPS TO HELP YOUR FIRM  
ADAPT AND  
THRIVE



## HOTEL RESERVATION FORM

2021 TRUST ADVISORS FORUM | BOOKING ID #76529

Friday, February 19 - Wednesday, February 24, 2021

We look forward to welcoming you to Pinehurst! Reservations will be accepted until January 20th 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: European Plan LOCATION: CAROLINA HOTEL, HOLLY INN, OR 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: \_\_\_\_\_ (\$192.00 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: 10:00AM

RESORT SERVICE FEE & STATE SALES TAX: A 10% resort service fee will be added to your account. State sales tax of 7% 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](mailto:Group.Reservations@pinehurst.com)

Toll-Free: 855-295-9940

Fax: 910-235-8240

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 _____
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)



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