

32ND ANNUAL

# TRUST ADVISORS FORUM

PINEHURST RESORT, NC  
FEBRUARY 26 - MARCH 1

2023



Choosing Your  
Best Strategy



**CAMPBELL**  
UNIVERSITY

Lundy-Fetterman  
School of Business





# WELCOME

## TO THE FORUM

Dear Colleague:

I'm delighted to announce the 2023 Trust Advisors Forum will be held February 26 - March 1, 2023 at the fabulous Pinehurst Resort in North Carolina!

Now in its 32nd 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 2023!

Cordially,

Jason Niell  
President  
Trust Education Foundation, Inc.  
Senior Vice President/National Manager Trust Administration  
City National Bank

# MEET THE SPONSORS

The Trust Education Foundation, Inc. and Campbell University are the primary sponsors of the 2023 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. 2022 Forum attendees are entitled to receive 16.5 hours of CFP®, 18.25 hours of CTFA, 7.75 hours of CRSP, 7.75 hours of CISP, and 16.5 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 26, 2023

3:00 pm - 5:30 pm

Forum Registration

5:30 pm - 7:00 pm

Opening Session Reception & Cocktail Party

CARDINAL ROOM

JASON NIELL  
President  
Trust Education Foundation,  
Inc.  
Senior Vice President/National  
Manager Trust Administration  
City National Bank

MARIA STURGES  
Chairman  
Trust Education Foundaton, Inc.  
Managing Director of Compliance  
Piedmont Trust Company

Dining on your own





6:30 am - 8:00 am

### Breakfast Buffet

CAROLINA DINING ROOM

8:00 am - 9:30 am

### Hot Topics in Estate Planning

ELIE J. FOY  
PARTNER  
Wyrick Robbins

CHRISTOPHER N. HEWITT  
Of Counsel  
Womble Bond Dickinson (US) LLP

9:30 am - 10:00 am

### The Foundation, Campbell University & Student Introductions

RYAN A. NEWKIRK  
Member, TEF Board  
Principal  
Granville Capital Inc.

REBECCA W. BROCK  
Member, TEF Board  
Fiduciary Executive, Private Wealth  
Management/Senior Vice President  
Truist Bank

PHILLIP STRICKLAND  
Member, TEF Board  
Senior Director of Institutional Trust/  
Senior Vice President  
First Citizens Bank

DR. J. BRADLEY CREED  
President  
Campbell University

10:00 am - 10:30 pm

### Break and Exhibits

CARDINAL ROOM

10:30 pm - 12:00 pm

### Management Panel

RYAN A. NEWKIRK - MODERATOR  
Principal  
Granville Capital Inc.

Panelists:

ADAM CLARK  
Global Head of Trusts and Estates and  
Managing Director  
J.P. Morgan Private Bank

MICHAEL W. MILICH  
Director of Trust/Senior Executive Vice  
President  
Frost Wealth Advisors

J. MCGREGOR CARR  
Executive Director of Wealth Manage-  
ment/Executive Vice President  
Comerica Bank

12:00 pm - 1:30 pm

### Lunch

CAROLINA HALL (DOWNSTAIRS)

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

CARDINAL ROOM

3:30 pm - 4:30 pm

### Regulatory and Fiduciary Case Law Update

NORA GIEG CHATHA  
Shareholder

Tucker Arensberg, PC

5:30 pm - 7:00 pm

### Reception and Cocktail Party

CARDINAL ROOM

Dining on your own

6:30 am - 8:00 am

### Breakfast Buffet

CAROLINA DINING ROOM

8:00 am - 9:00 am

### Increasing the Value of a Privately-Held Business: Strategies for Sustainable Growth, Ownership Succession and Shareholder Liquidity

J. LEE LLOYD

Senior Advisor, Global Mergers and Acquisitions / Corporate Finance

J. Lee Lloyd, LLC

9:00 am - 10:00 am

### State Income Taxation of Trust: Challenges and Opportunities

ANDREA C. CHOMAKOS

Chief Fiduciary Officer

Bank OZK

10:00 am - 10:30 am

### Break and Exhibits

CARDINAL ROOM

10:30 am - 12:00 pm

### Directed Trusts and the Tools for Trust Decanting

DANIEL F. HAYWARD

Director

Gordon, Fournaris & Mammarella, P.A.

12:00 pm - 1:30 pm

### Lunch

CAROLINA HALL (DOWNSTAIRS)

1:30 pm - 2:30 pm

### The Three "R's" of Estate Settlement: Responsibilities, Risks and Rewards

ROBERT M. MAXWELL

Director of Estate & Trust Settlement/Managing Director

The Glenmede Trust Company

2:30 pm - 3:30 pm

### The Basics of Digital Asset Planning and Administration

BRUCE D. HENDRYX

Senior Vice President / Director of Closely Held Business Strategies

PNC Private Bank

3:30 pm - 7:00 pm

### Dining on your own



6:30 am - 8:00 am

### Breakfast Buffet

CAROLINA DINING ROOM

8:00 am - 9:30 am

### What if Chuck Norris Taught Cybersecurity

STEVEN WUJEK

Network Architect & Security Engineer

Cybersecurity Speaker and Consultant and Expert Legal Witness

TCDI

9:30 am - 11:00 am

### Compliance and Risk Management

PATRICK ALYWARD - MODERATOR

Chief Revenue Officer/Chief Operating Officer

Atticus, Inc.

Panelists:

SEAN GRAY

Managing Director and Chief Compliance Officer

Bessemer Trust

JEREMY MCCAMIC

Relationship Manager

Fairview Investment Services

RANDALL S. "RANDY" BOND

Head of Trust and Wealth Strategy and Chief Fiduciary Officer

Texas Capital Bank

11:00 am

### Wrap Up

JASON NIELL

President

Trust Education Foundation, Inc.

Senior Vice President / Manager National Trust Administration

City National Bank



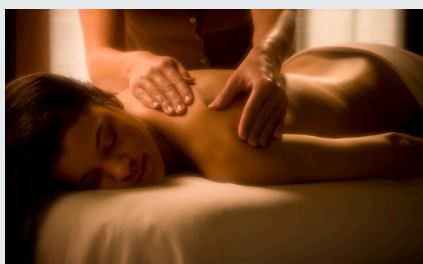


# REGISTER TODAY

## 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 register online at <https://book.b4checkin.com/chameleon/Pinehurst/rlp/83674> by Wednesday, January 25, 2023.



The registration deadline is Friday, February 25, 2023. The \$795 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 (\$795) 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, Inc.

## Make Your Pinehurst Reservations

Reserve your room early. You can either register online by going to <https://book.b4checkin.com/chameleon/Pinehurst/rlp/83674> or register by phone. Our dedicated group toll free number is (888) 894-4142. The reservation deadline is Wednesday, January 25, 2023. Please note that after January 25th, reservations can only be made (subject to availability) by calling our dedicated group toll free number above.

Consider your dates of stay. The Forum begins at 5:30 pm on Sunday, February 26, and ends at 11:00 am on Wednesday, March 1. 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. Indicate planned your arrival and departure dates when registering online or when speaking with the sales agent.

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).

### 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, 1-888-894-4142
- Sponsorship opportunities: Maria Sturges, [Maria.Sturges@piedmonttrust.com](mailto:Maria.Sturges@piedmonttrust.com)
- 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 26 - March 1, 2023

## REGISTRATION FORM

Please complete the form below in order to register for the 31st 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 (\$795) 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# \_\_\_\_\_

**PRICING INFO:** \$795 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



# CAMPBELL TRUST PROGRAM

CAMPBELL'S TRUST AND WEALTH MANAGEMENT PROGRAM IS THE NATION'S FIRST, AND STILL THE ONLY, UNDERGRADUATE AND GRADUATE LEVEL DEGREE PROGRAM OF ITS KIND IN THE UNITED STATES. PART OF THE LUNDY-FETTERMAN SCHOOL OF BUSINESS. THE PROGRAM PREPARES GRADUATES TO SERVE THE FINANCIAL NEEDS OF HIGH-NET-WORTH INDIVIDUALS BY MANAGING THEIR ASSETS AND BY DEVELOPING AND IMPLEMENTING SOPHISTICATED TAX, FINANCIAL AND ESTATE PLANNING STRATEGIES.



THE TRUST EDUCATION FOUNDATION, INC., (TEF) was formed in 1971. Its mission is to support the Trust and Wealth Management Program offered by Campbell University. The TEF Board of Directors is composed of senior managers from the nation's premier financial institutions. The Foundation sponsors educational programs around the country in its attempt to fulfill its mission.

The Foundation supports the Trust Program by:

- Providing curriculum oversight ensuring students are exposed to cutting edge instruction in the areas of Fiduciary Law, Tax Planning, Financial Planning, Investment Management, Estate Planning and in Trust and Estate Administration.
- Providing scholarship aid for worthy deserving students enrolled in the Trust Program. Over 25 scholarships have been fully funded due to the efforts of the Foundation.
- Spreading the word about the Campbell University Trust Program by increasing the visibility of the program among financial institutions nationwide and enhancing the placement opportunities available to the graduates.

The flagship program offered by the Foundation is the TRUST ADVISORS FORUM (TAF) at Pinehurst. In a typical year approximately 275 senior trust officers from 30 states representing 110 institutions will attend the four-day educational program. The Forum is the nation's foremost conference for trust professionals. More importantly, the leading institutions from across the country actively recruit on campus each year.





Lundy-Fetterman  
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Campbell University  
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Buies Creek, NC 27506

