



Choosing Your Best Strategy



School of Business

WELCOME



Dear Colleague:

I'm delighted to announce the 2024 Trust Advisors Forum will be held February 25-28, 2024 at the fabulous Pinehurst Resort in North Carolina!

Now in its 33rd 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 many 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 2024!

Cordially,

Jason Niell

President

Trust Education Foundation, Inc.

Senior Vice President/National Manager Trust Administration

City National Bank

SPONSORS

The Trust Education Foundation, Inc. and Campbell University are the primary sponsors of the 2024 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.



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

and www.campbell.edu for more information.



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. 2024 Forum attendees are entitled to receive hours of CFP®, hours of CTFA, hours of CRSP, hours of CISP, and 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 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 25, 2024

3:00 pm - 5:30 pm

5:30 pm - 7:00 pm

Forum Registration

Opening Session Reception & Cocktail Party

CARDINAL ROOM

MARIA STURGES President Trust Education Foundaton, Inc. Managing Director of Compliance Piedmont Trust Company JASON NIELL President Trust Education Foundation, Inc. Manager National Trust Administration / Senior Vice President City National Bank

Dining on your own



DAY

MONDAY, FEBRUARY 26, 2024

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 Associate 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. PHILLIP STRICKLAND Member, TEF Board Senior Director of Institutional Trust / Senior Vice President First Citizens Bank PHILLIP STRICKLAND Member, TEF Board Senior Director of Institutional Trust / Senior Vice Private Wealth Management / Senior Vice President Truist 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: JEN GALVAGNA Managing Director / Head of Trust, Estate & Tax Solutions Bank of America Private Bank KERRY PORTER Vice President Senior Fiduciary Director Brown Brothers Harriman Trust Company of Delaware N.A.							
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 Update NORA GIEG CHATHA Shareholder Tucker Arensberg, PC							
5:30 pm - 7:00 pm	Reception and Cocktail Party CARDINAL ROOM							
	Dining on your own							

DAY TUESDAY, February 27, 2024

6:30 am - 8:00 am	Breakfast Buffet CAROLINA DINING ROOM
8:00 am - 9:00 am	The Future of Wealth Management - The Challenges of Intergenerational Wealth Transfers and Changing Investor Expectations J. WOMACK ("JAY") Global Head of Investment Solutions SEI Global Asset Management
9:00 am - 10:00 am	Fun Career Booster: Responsible AI that you can Explain, Operate and Govern JAMES MASSA Executive Director of Software Engineering and Architecture JP Morgan Chase & Co.
10:00 am - 10:30 am	Break and Exhibits CARDINAL ROOM
10:30 am - 12:00 pm	Topic TBD SPEAKER TBD TBD TBD
12:00 pm - 1:30 pm	Lunch CAROLINA HALL (DOWNSTAIRS)
1:30 pm - 2:30 pm	Managing Tangible Assets: Unlocking the Potential of Hidden Wealth SHANE DAVID HALL Director, High Profile Division The Fine Art Group
2:30 pm - 3:30 pm	Fiduciary and Trust/Conservator Account Dreams and Challenges – The Nuts and Bolts of Fiduciary Accountings FRANCINE LEE US Fiduciary/Trust & Estate Accounting Services Senior Manager EY
3:30 pm - 7:00 pm	Dining on your own



WEDNESDAY, February 28, 2024

6:30 am - 8:00 am

Breakfast Buffet CAROLINA DINING ROOM

8:00 am - 9:30 am

What if the "Wicked Witch of the West" had a Laptop?

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

Founder and CEO TRUSTworthy Consultants, LLC

Panelists:

HOLLY BAILEY

Senior Vice President / Manager, Global Fiduciary Risk Management The Northern Trust Company **TODD ABRAMS**

Bank Examiner Office of the Comptroller of the Currency SACHA WALDECK

Chief Compliance Officer Raymond James Trust N.A.

11:00 am

Wrap Up

JASON NIELL

President

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





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 register online at <u>get-taroom.b4checkin.com/Pine-hurst/rlp/91388</u> by Wednesday, January 23, 2024.







The registration deadline is Friday, February 23, 2024. 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.trusteducationfoundation.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.

Make Your Pinehurst Reservations

Reserve your room early. You can either register online by going to **gettaroom**. **b4checkin.com/Pinehurst/rlp/91388** or register by phone. Our dedicated group toll free number is (855) 295-9940. The reservation deadline is Wednesday, January 23, 2024. 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 25, and ends at 11:00 am on Wednesday, February 28. Hotel check-in time is 4 pm, and check-out time is 10:00 am. Pinehurst will be happy to extend your stay (subject to availability) for up to two days before the Forum. Indicate your planned 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.

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**: Maria Sturges, Maria.Sturges@piedmonttrust.com
- General questions and continuing education credits: Jimmy Witherspoon, Campbell University, witherspoon@campbell.edu, or 1-910-893-1387

TRUST ADVISORS FORUM

Pinehurst Resort, NC | February 25-28, 2024

REGISTRATION FORM

Please complete the form below in order to register for the 33rd Annual Trust Advisors Forum at the Pinehurst Resort, NC.

For faster processing, we recommend you submit this form and pay online at:

www.trusteducationfoundation.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				<u>-</u>				
								Middle Initial
Title:								
Firm or Institution:								
Mailing Address:								
City:						State:	Zip: _	
Nickname (for badge):								
Business Telephone:								
Circle Designations Held:	CTFA	CRSP	CFP	ATFA	Other			
Please provide CFP ID# and	Name as it	appears	on the (CFP datab	ase.			
CFP ID#			CTFA/C	RSP ID#				

PRICING INFO: \$795 Full registration cost

MAILING ADDRESS: Trust Education Foundation, Inc.

Campbell University

PO Box 218

Buies Creek, NC 27506

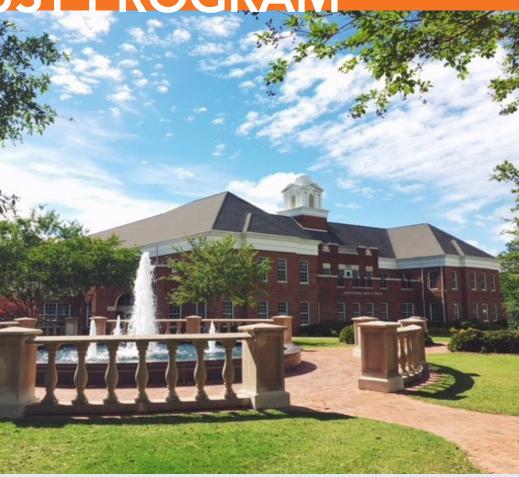
Please make checks payable to: Trust Education Foundation Inc.



CAMPBELL TRUST PROGRA

CAMPBELL'S TRUST AND WEALTH MANAGEMENT PROGRAM IS THE NATION'S FIRST, AND STILL THE ONLY, UNDERGRADUATE DEGREE PRO-GRAM OF ITS KIND IN THE UNITED STATES. PART OF THE LUNDY-FET-TERMAN 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 325 senior trust officers from 38 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.







TRUST EDUCATION FOUNDATION, INC.

Campbell University Post Office Box 218 Buies Creek, NC 27506

