

33RD ANNUAL

TRUST ADVISORS FORUM

PINEHURST RESORT, NC
FEBRUARY 25 - 28

2024



Choosing Your
Best Strategy



Lundy-Fetterman
School of Business



WELCOME

TO THE FORUM

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

MEET THE SPONSORS

The Trust Education Foundation, Inc. and Campbell University are the primary sponsors of the 2024 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
and 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. 2024 Forum attendees are entitled to receive 16.5 hours of CFP®, 18.25 hours of CTFA, 7.25 hours of CRSP, 7.25 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 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

Forum Registration

5:30 pm - 7:00 pm

Opening Session Reception & Cocktail Party

CARDINAL ROOM

MARIA STURGES

President

Trust Education Foundaton, Inc.

Managing Director of Compliance

Piedmont Trust Company

JASON NIELL

President

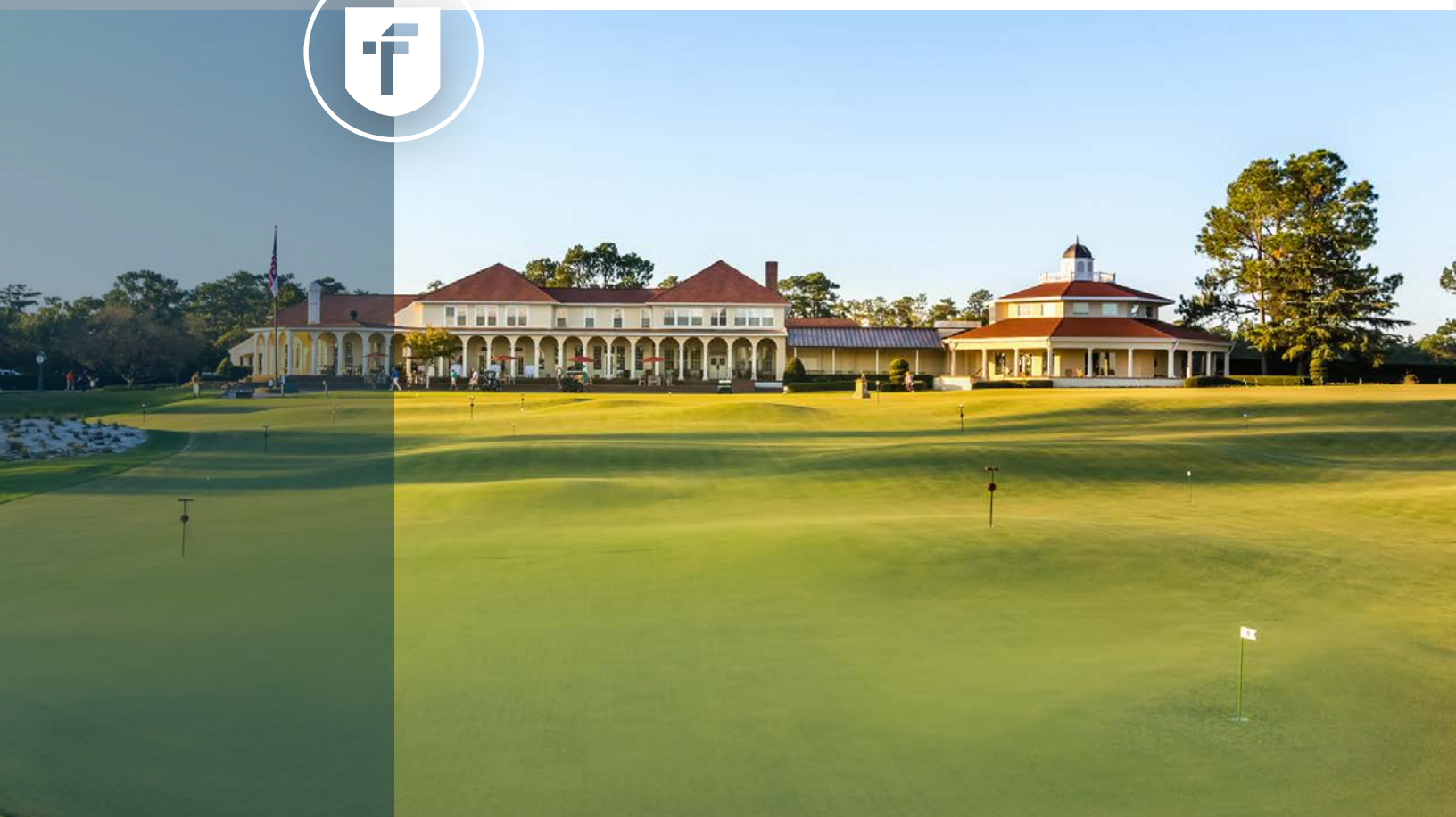
Trust Education Foundation, Inc.

Manager National Trust Administration /

Senior Vice President

City National Bank

Dining on your own



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

REBECCA W. BROCK
Member, TEF Board
Fiduciary Executive,
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 am - 12:00 pm

Management Panel

RYAN A. NEWKIRK - MODERATOR
Principal
Granville Capital Inc.

Panelists:

JEN GALVAGNA
Managing Director &
Head of Trust,
Estates & Tax
Bank of America
Private Bank

KERRY PORTER
Vice President /
Senior Fiduciary Director
Brown Brothers
Harriman Trust Company
of Delaware N.A.

KENNETH E. LAKO
President /
Chief Executive Officer
Members Trust Company

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

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

Dueling Perspectives on Capacity and Undue Influence

SCOTT RAHN
Founding Partner
RMO LLP

DANA CHIDEKEL, PH.D
Clinical and Forensic Neuropsychologist

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
Fiduciary/Trust & Estates Services, Managing Director
Ernst & Young LLP

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 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 –

Asset Management

Lead Expert –

Midwest/West Region

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



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.

Please register online at gettaroom.b4checkin.com/Pinehurst/rlp/91388 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.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**.

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.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# _____ CTFA/CRSP 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 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 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.





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School of Business

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Campbell University
Post Office Box 218
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