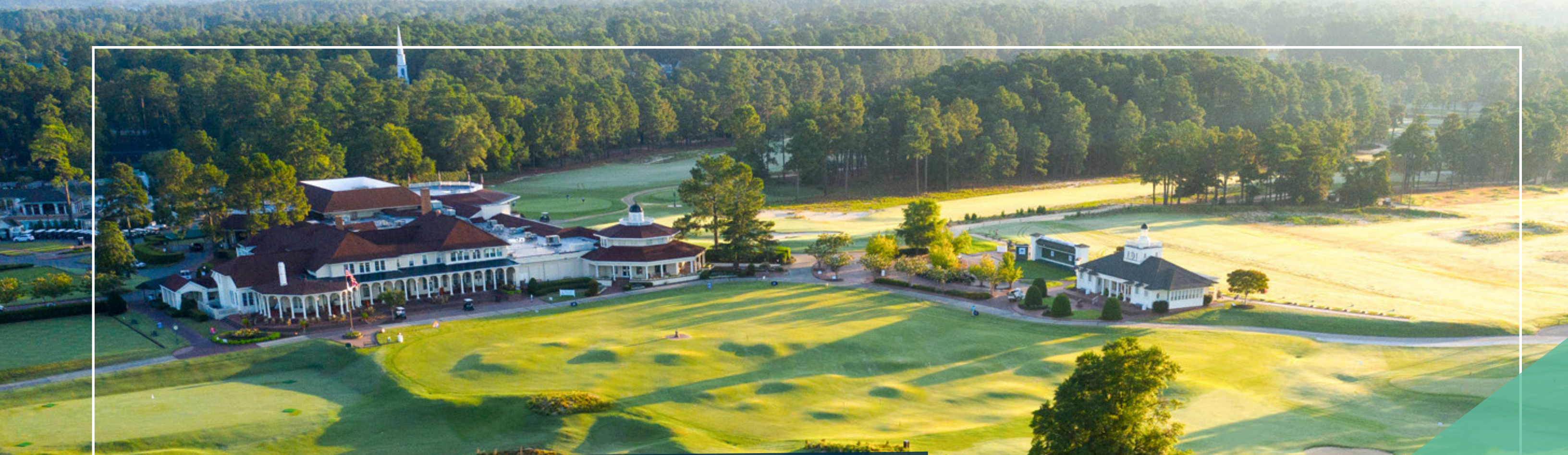

34TH ANNUAL

TRUST ADVISORS FORUM

Choosing Your Best Strategy

PINEHURST RESORT, NC

FEBRUARY 23- 26

2025

CAMPBELL UNIVERSITY

Lundy-Fetterman School of Business

WELCOME TO THE FORUM

Dear Colleague:

I'm delighted to announce the 2025 Trust Advisors Forum will be held February 23-26, 2025 at the fabulous Pinehurst Resort in North Carolina!

Now in its 34th 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 2025!

Cordially,

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

MEET THE
SPONSORS

The Trust Education Foundation, Inc. and Campbell University are the primary sponsors of the 2025 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 professionals. The program agenda is submitted each year for pre-approval for CTFA, CRSP, ATFA, CLE and CFP® continuing education credit. 2025 Forum attendees are entitled to receive 16.5 hours of CFP®, 18.25 hours of CTFA, 3.25 hours of CRSP, and 16.5 hours of ATFA continuing education credits. The Board of Continuing Legal Education of the North Carolina State Bar has approved the Forum for 14 hours of CLE credit.

If a Forum participant holds certifications not listed above or is interested in receiving, for example, CLE (in states other than North Carolina) 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 23, 2025

3:00 pm - 5:30 pm	Forum Registration
5:30 pm - 7:00 pm	Opening Session Reception & Cocktail Party CARDINAL ROOM

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

LAURENCE CHAMBERS
President
Trust Education Foundation, Inc.
Executive Director | Trust Senior Manager
Specialty Trust Administration
Trust Client & Advisor Services
Wells Fargo Wealth and Investment Management

Dining on your own

DAY 1

MONDAY, FEBRUARY 24, 2025

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 *Partner* Womble Bond Dickinson (US) LLP
9:30 am - 10:00 am	**The Foundation, Campbell University & Student Introductions** RYAN A. NEWKIRK *Member,* TEF Board *Partner* Granville Capital Inc. PHILLIP STRICKLAND *Member,* TEF Board *Executive Director of Trust & Fiduciary Services / 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 pm - 12:00 pm	**Management Panel** RYAN A. NEWKIRK - MODERATOR *Partner* Granville Capital Inc. Panelists: ANDREW "ANDY" REINHART *Chief Fiduciary Officer / Head of Trust Services* Wells Fargo Bank CHRIS STAPLES *Chief Operating Officer* Baird Trust MELISSA HOLDING *Executive Vice President/ Director of Wealth Management* Huntington National 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 *Member* Eckert Seamans Cherin & Mellott, LLC
5:30 pm - 7:00 pm	**Reception and Cocktail Party** CARDINAL ROOM
	Dining on your own

DAY 2

TUESDAY, February 25, 2025

6:30 am - 8:00 am	**Breakfast Buffet** CAROLINA DINING ROOM
8:00 am - 9:00 am	**Corporate Transparency Act Update** BRUCE HENDRYX *Senior Vice President, Director of Business Strategies* PNC Bank
9:00 am - 10:00 am	**Medicare Planning for High-Income Clients** JOHN GOLDSBURY *Volunteer* SHIIP of North Carolina
10:00 am - 10:30 am	**Break and Exhibits** CARDINAL ROOM
10:30 am - 11:30 pm	**A Digital Experience for Advisors** SCOTT LAMONT *Wealth Technology Strategist* F2 Strategy
11:30 pm - 1:00 pm	**Lunch** CAROLINA HALL (DOWNSTAIRS)
1:00 pm - 2:00 pm	**DEMYSTIFYING DIRECT INDEXING** BRUCE SIMPSON *Senior Portfolio Manager* MainStreet Advisors ALEX URBANI *President / Head of Revenue* MainStreet Advisors
2:00 pm - 3:30 pm	**A Discussion on Non-Judicial Settlement Agreements** SCOTT RAHN *Founding Partner* RMO LLP LUKE A. LANTTA *Partner and Co-Leader, Fiduciary Disputes Team* Bryan Cave Leighton Paisner LLP
3:30 pm - 7:00 pm	Dining on your own

DAY 3

WEDNESDAY, February 26, 2025

6:30 am - 8:00 am

Breakfast Buffet

CAROLINA DINING ROOM

8:00 am - 9:15 am

Understanding Non-Custody Assets Under Administration: Challenges and Opportunities

RANDALL "RANDY" BOND
Chief Fiduciary Officer
Arden Trust Company

MARIA STURGES
Executive Vice President and Chief Operating Officer
Arden Trust Company

9:30 am - 11:00 am

Fiduciary Compliance Panel – Unique Assets

PATRICK ALYWARD - MODERATOR
Executive Director
Trust Education Foundation, Inc.
Founder and CEO
TRUSTworthy Consultants, LLC

Panelists:

ROBERT DRAY
Director Trust Special Assets
First Citizens Bank

GRETCHEN GOODE
Head of Wealth and Trust
SS&C Technologies

CHRIS PROCISE

11:00 am

Wrap Up

PATRICK ALYWARD
Executive Director, Trust Education Foundation, Inc.

Founder and CEO
TRUSTworthy Consultants, 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.

Please register online at https://book.rguest.com/wbe/group/727/pinehursthotel/auth?langCode=EN by Wednesday, January 22, 2025.

The registration deadline is Friday, February 21, 2025. 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 **https://book.rguest.com/wbe/group/727/pinehursthotel/auth?langCode=EN** using **Group Code 103271** and **Password 25380187** or register by phone. *Note: Pinehurst online reservations is currently going through a conversion process. It may in error initially indicate the Carolina and Holly are "Sold Out".* Please select your dates to see actual availability. Our dedicated group toll free number is (855) 295-9940. To inquire about adding additional nights to your stay, please call our group toll free number. The reservation deadline is Wednesday, January 22, 2025. **Please note that after January 22nd, 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 23, and ends at 11:00 am on Wednesday, February 26. 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**: Patrick Alyward, patrick.alyward@hotmail.com
- **General questions and continuing education credits**: Jimmy Witherspoon, Campbell University, witherspoon@campbell.edu, or 1-910-893-1387

34TH ANNUAL

TRUST ADVISORS FORUM

Pinehurst Resort, NC | February 23-26, 2025

REGISTRATION FORM

Please complete the form below in order to register for the 34th 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 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# __________ ATFA ID# __________

☐ I am a member of the NC Bar Association NC Bar# ____________________

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.

CAMPBELL
UNIVERSITY
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School of Business

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.

TRUST EDUCATION Foundation

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.

CAMPBELL UNIVERSITY
Lundy-Fetterman
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TRUST EDUCATION FOUNDATION, INC.
Campbell University
Post Office Box 218
Buies Creek, NC 27506