



35TH ANNUAL

TRUST
ADVISORS
FORUM
2026

*Choosing
Your Best
Strategy*

PINEHURST RESORT, NC
FEBRUARY 22-25, 2026



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

WELCOME TO THE FORUM

Dear Colleague:

I'm delighted to announce the 2026 Trust Advisors Forum will be held February 22-25, 2026 at the fabulous Pinehurst Resort in North Carolina!

Now in its 35th 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 2026!

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 2026 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 50 financial services professionals from 35 firms.



CAMPBELL
UNIVERSITY

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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 (approved for 18.25 hrs), ATFA (approved for 16.5 hrs), CLE (approved by NC Bar for 14 hrs) and CFP® (approved for 16.5 hrs) continuing education 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 22, 2026

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 / Senior Lead
Business Execution Consultant
Trust Client & Advisor Services
Wells Fargo Wealth and
Investment Management

Dining on your own



NETWORKING
OPPORTUNITIES

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. WILLIAM M. DOWNS
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:

LIESL KISTOW
Head of Wealth
Management Trust
Administration Services /
Senior Vice President
US Bank

MELISSA HOLDING
Executive Vice President /
Director of Wealth
Management
Huntington National
Bank

GREGG HOMAN
Head of Strategic
Partnership - Private
Client Services
JTC USA

12:00 pm - 1:30 pm

Lunch

CAROLINA HALL (DOWNSTAIRS)

1:30 pm - 3:00 pm

Regulatory and Fiduciary Case Law Update

NORA GIEG CHATHA
Member
Eckert Seamans Cherin & Mellott, LLC

3:00 pm - 3:30 pm

Break and Exhibits

CARDINAL ROOM

3:30 pm - 4:30 pm

Economic and Market Outlook

KAREN MANNA
Investment Director / Portfolio Manager / Vice President
Federated Hermes

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

Working with Beneficiaries with Mental Health Disorders
AMANDA KOPLIN
Founder / CEO
Koplin Consulting

9:00 am - 10:00 am

Federal Legislative and Regulatory Updates
DALE BAKER
Vice President, Trust Policy
American Bankers Association

10:00 am - 10:30 am

Break and Exhibits
CARDINAL ROOM

10:30 am - 12:00 pm

Generation-Skipping Transfer Tax Essentials for Fiduciaries
MICHAEL F. MACERO
Director, Washington National Tax
KPMG

12:00 pm - 1:30 pm

Lunch
CAROLINA HALL (DOWNSTAIRS)

1:30 pm - 2:30 pm

AI's Evolution and Future in Wealth
ZACH WOMACK
SEI Chief Technology Officer
SEI Private Banking and Wealth Management

ALLIE CAREY
Chief Strategy Officer
SEI Private Banking and Wealth Management

2:30 pm - 3:30 pm

Managing Investment Real Estate as a Fiduciary
SCOTT BENNETT
Head of Specialty Asset Management / Managing Director
Wells Fargo 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

**Shiny Objects, Trojan Horses, Pandora's Box:
Is your Financial Institution Obsessing instead of
Progressing your Cyber Defenses**

STEVEN WUJEK

Network Architect & Security Engineer

Cybersecurity Speaker and Consultant and Expert Legal Witness

TCDI

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:

GABRIELLE BAILEY

*Managing Director /
Chief Fiduciary Officer*
Glenmede

MICHAEL BRIDGEMAN

*Chief Compliance &
Risk Officer*
Trust Company of the
South

WILL LUCIUS

Chief Trust Officer
Raymond James Trust,
N.A.

11:00 am

Wrap Up

PATRICK ALYWARD

Executive Director, Trust Education Foundation, Inc.

Founder and CEO

TRUSTworthy Consultants, LLC



PLANNING AND
COMPLIANCE

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.rquest.com/wbe/group/727/pinehursthotel/auth?langCode=EN> by Wednesday, January 21, 2026.



The registration deadline is Friday, February 20, 2026. 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 <https://book.rquest.com/wbe/group/727/pinehursthotel/auth?langCode=EN> using **Group Code 109388** and **Password 15286513** or register by phone. *Note that the dedicated TAF page on Pinehurst hotel reservation site shows all hotel rooms as being "Sold Out" until you enter the desired nights of your stay.* Our dedicated group toll free number is (855) 295-9940. To inquire about adding additional nights to your stay (at the same discounted rates for up to two days before the Forum begins or after the Forum ends), please call our group toll free number. The reservation deadline is Wednesday, January 21, 2026. **Please note that after January 21st, 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 22, and ends at 11:00 am on Wednesday, February 25. 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.allyward@hotmail.com
- **General questions and continuing education credits:** Jimmy Witherspoon, Campbell University, wittherspoon@campbell.edu, or 1-910-893-1387

TRUST ADVISORS FORUM

Pinehurst Resort, NC | February 22-25, 2026

REGISTRATION FORM

Please complete the form below in order to register for the 35th 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'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.



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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 40 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





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