

REGISTER NOW!

AND JOIN YOUR FELLOW WEALTH & TRUST PROFESSIONALS

TRUST ADVISORS FORUM 2027

36TH ANNUAL



PINEHURST RESORT, NC

FEBRUARY 21-24, 2027

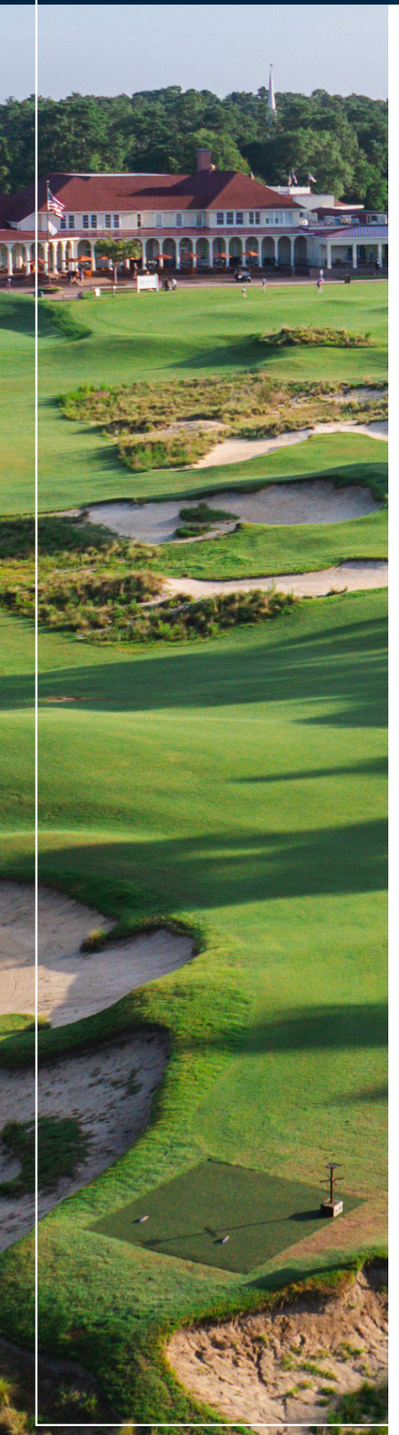
TRUST EDUCATION Foundation

Choosing Your Best Strategy

CAMPBELL UNIVERSITY

Lundy-Fetterman School of Business

WELCOME TO THE FORUM



Dear Colleague:

I'm delighted to announce the 2027 Trust Advisors Forum will be held February 21-24, 2027 at the fabulous Pinehurst Resort in North Carolina!

Now in its 36th 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 2027!

Cordially,

Jason Niell
Chairman
Trust Education Foundation, Inc.
Managing Director / Manager Trust Administration
Midwest Trust Company

MEET THE SPONSORS

The Trust Education Foundation, Inc. and Campbell University are the primary sponsors of the 2027 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
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 (18.25 hrs), ATFA (16.5 hrs), NC CLE (14 hrs), CRSP (1.25 hrs), CISP (1.25 hrs) and CFP® (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 21, 2027

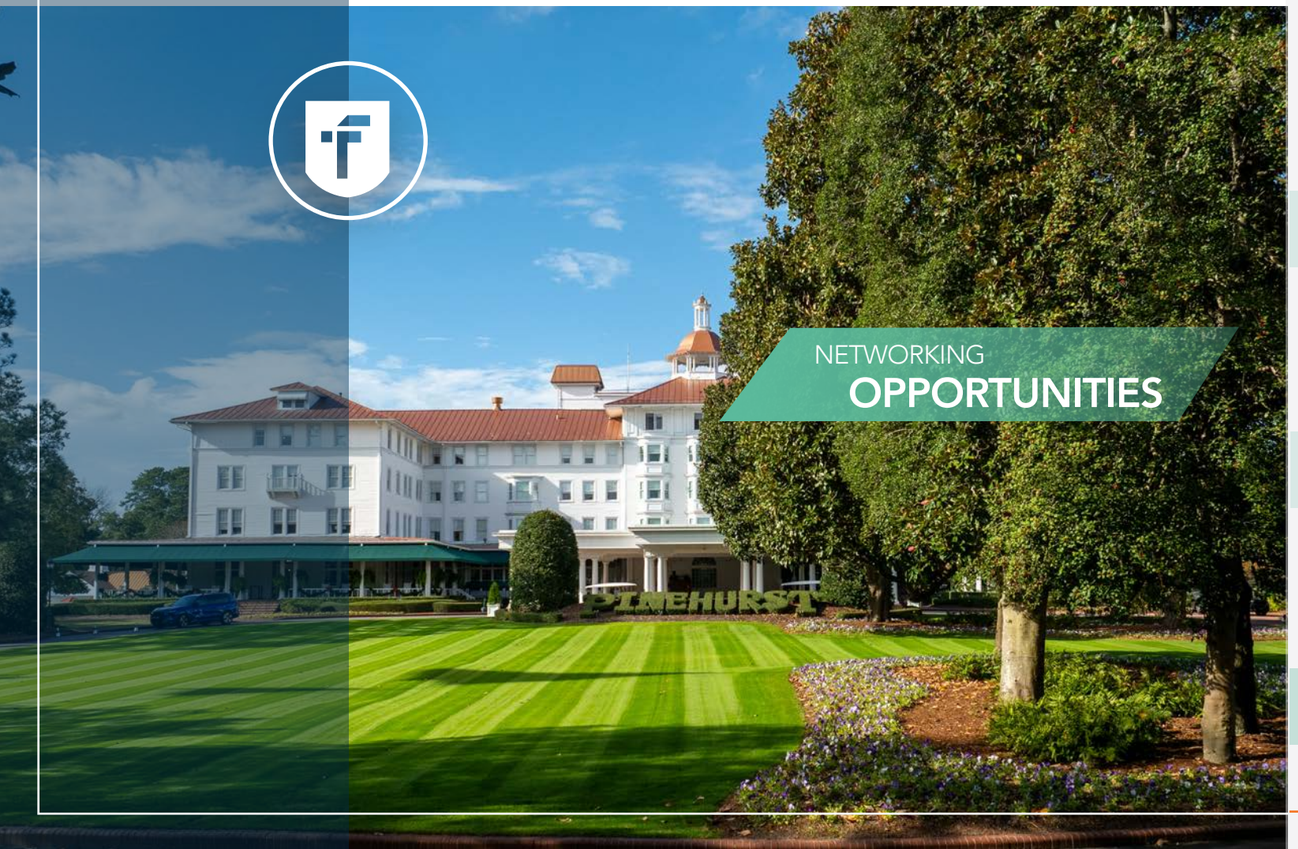
3:00 pm - 5:30 pm — Forum Registration

5:30 pm - 7:00 pm — Opening Session Reception & Cocktail Party
CARDINAL ROOM

JASON NIELL
Chairman
Trust Education Foundation, Inc.
Managing Director / Manager Trust Administration
Midwest Trust Company

LAURENCE CHAMBERS
President
Trust Education Foundation, Inc.
Executive Director / Senior Lead Business Execution Consultant
Wells Fargo Wealth and Investment Management

Dining on your own



DAY 1 — MONDAY, February 22, 2027

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
Fiduciary Counsel
Trust Company of the South

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:

MARC MCKAY
National Head of Trust, Estate & Fiduciary Administration
BMO Financial Group

SAMANTHA VIRDIN-SMETANA
Senior Vice President, Trust Regional Manager
City National Bank

GENTRY BARNETT BYRNES
Chief Fiduciary Officer & Co-Founder
Adelphi Trust

12:00 pm - 1:30 pm — Lunch
CAROLINA HALL (DOWNSTAIRS)

1:30 pm - 3:00 pm — Special Needs Trusts 101: What Trust Companies Should Know

NORA GIEG CHATHA
Business Development Director
Inspire Trust

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

DAY 2 — TUESDAY, February 23, 2027

6:30 am - 8:00 am — Breakfast Buffet
CAROLINA DINING ROOM

8:00 am - 9:00 am — Stablecoins – What does that Mean for Wealth Managers?

MIKE TROPEANO, CFA
Senior Vice President, Client Engagement and Practice Management
Fi-Tek, LLC

9:00 am - 10:00 am — One of You Has Done This Two Hundred Times: Representing the First-Time Seller Across the Table from Professional Capital

JOHN FENNEBRESQUE
Founder and Managing Partner
Fennebresque & Company

10:00 am - 10:30 am — Break and Exhibits
CARDINAL ROOM

10:30 am - 12:00 pm — Decoding Directed Trusts

ANDREA CHOMAKOS
Managing Director – Charlotte
Pendleton Square Trust Company

JONATHAN CONNOLLY
Senior Managing Director
Enterprise Trust, a Lido Company

12:00 pm - 1:30 pm — Lunch
CAROLINA HALL (DOWNSTAIRS)

1:30 pm - 2:30 pm — When Protection Meets Autonomy: The Trustee's Role in Navigating Potential Elder Abuse

LUKE A. LANTTA
Partner and Co-Leader Fiduciary Disputes Team
Bryan Cave Leighton Paisner LLP

2:30 pm - 3:30 pm — Wealth Priorities: The 25 Best Practices of Multi-generational Families

NATALIE R. SMAILES
Senior Vice President
Truist Wealth
Managing Director Strategic Client Development
Center for Family Legacy

3:30 pm - 7:00 pm — Dining on your own

DAY 3 — WEDNESDAY, February 24, 2027

6:30 am - 8:00 am — Breakfast Buffet
CAROLINA DINING ROOM

8:00 am - 9:30 am — Understanding the Next Generation of Investors

ALEX URBANI
Managing Director
MainStreet Advisors

9:00 am - 10:00 am — Fiduciary Compliance Panel – AML/BSA Update

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

Panelists:

TRACY ALLEN-WOLSKO
Executive Director
Business Risk and Controls /
Senior Vice President
First Citizens Bank

SEAN GRAY
Independent Board
Director & Senior Advisor

10:00 am - 11:00 am — You're Going to Get Sued (Try Not to Lose)

HARRISON LORD
Managing Member
Lord & Lindley

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 20, 2027.







The registration deadline is Friday, February 19, 2027. 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 BKG870** and **Password 20374526** 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 20, 2027. **(Given the high demand, we suggest you reserve your room ASAP) Please note that after January 20th, 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 21, and ends at 11:00 am on Wednesday, February 24. 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

36TH ANNUAL

TRUST ADVISORS FORUM

Pinehurst Resort, NC | February 21-24, 2027

REGISTRATION FORM

Please complete the form below in order to register for the 36th 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.

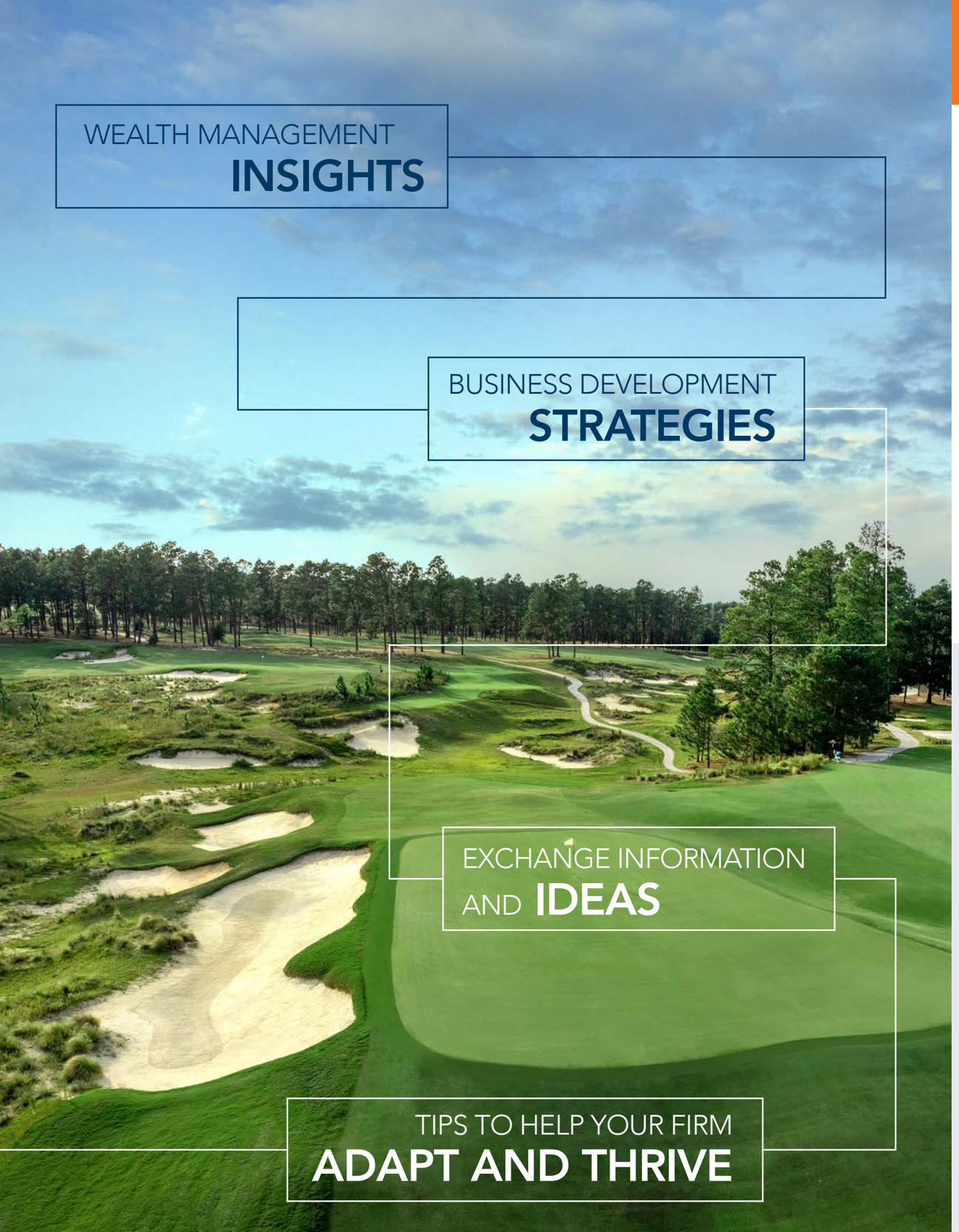
CFP ID#_____ CTFA/CRSP ID#_____ ATFA ID#_____

☐ 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.**



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
Lundy-Fetterman 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 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 350 senior trust officers from 38 states representing 110 institutions will attend the four-day educational program. The Forum is the nation's fore-most conference for trust professionals. More importantly, the leading institutions from across the country actively recruit on campus each year.

CAMPBELL UNIVERSITY

Lundy-Fetterman
School of Business

TRUST EDUCATION FOUNDATION, INC.
Campbell University
Post Office Box 218
Buies Creek, NC 27506

