

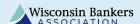
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## MIDWEST TRUST AND WEALTH MANAGEMENT **CONFERENCE**

The annual Midwest Trust and Wealth Management Conference is a must for wealth management and trust professionals throughout Michigan and our neighboring states. Featuring top-notch speakers and materials, continuing education credit (CTFA, CFP, CPE) and valuable networking opportunities, the event is a do-notmiss event.











#### WHO SHOULD ATTEND

All decision-makers from throughout the wealth management and trust industry. This conference is beneficial for:

- Trust department, trust company and private bank executives
- Senior trust officers, administrators and wealth advisors
- Business development officers and future leaders
- Financial and estate planners

#### **ACCOMMODATIONS**

Saint John's Resort 44045 Five Mile Road Plymouth, MI 48170

Saint John's Resort is just 20 minutes north of Detroit Metropolitan Airport, 30 minutes from downtown Detroit, and 15 minutes from Ann Arbor. Make reservations within our room block at (734) 414-0600 or by visiting



Our room block cut-off date is: SEPTEMBER 20.

#### **EXHIBITOR AND SPONSOR OPPORTUNITIES**

Contact Stephanie Fisher at sfisher@michigan.bank or (517) 342-9057.

CTFA and CFP credits are pending approval. NON-ABA CE search for training will appear as: Michigan Bankers Association | Midwest Trust and Wealth Management Conference

#### **TENATIVE AGENDA**

#### **OCTOBER 16**

1:00 p.m. 4:00 p.m. 7:00 p.m. Tee Times

**Exhibitor Set-Up Open** Welcome Mixer

#### **OCTOBER 17**

8:00 a.m. 8:30 - 9:20 a.m.

10:20 a.m.

11:50 a.m.

10:30 - 11:00 a.m.

11:00 - 11:50 a.m

1:00 - 1:50 p.m.

**Breakfast with Exhibitors** 

2024 Corporate Transparency Act

Patrick Alyward, Trustworthy Consultants LLC

9:30 - 10:20 a.m. **Economic Update** 

> Steve Chiavarone, Federated **Exhibitor Introductions Break with Exhibitors**

> > Real Estate in Trusts

Mark Harder, Warner Norcross + Judd

**Exhibitor Introductions Continued and Lunch** 

Case Law Update

David Skidmore, Warner Norcross + Judd

1:50 - 2:40 p.m. Planning for Uncertainty: Modifying Trusts

Douglas A. Mielock, Foster Swift Collins &

Smith PC

2:40 - 3:00 p.m. 3:00 - 3:50 p.m.

3:50 - 4:30 p.m.

Refreshment Break with Exhibitors **Broker / Trust Panel Discussion** 

Panelists: Tom Hufton, The State Bank; Matt

Moses, Southern Michigan Bank and Trust

Tax Structures to Protect and Preserve Wealth George Grzywacz, CPA / JD, Doeren Mayhew

4:30 p.m. **Reception with Exhibitors** 

#### **OCTOBER 18**

8:00 - 8:30 a.m. 8:30 - 9:20 a.m.

**Continental Breakfast with Exhibitors** Pricing Wealth Management - Enhance Revenue and Maximize Client Retention Mike Dixon, Pohl Consulting and Training Inc.

9:20 - 10:10 a.m. **Estate Settlement** 

> Rachel Mortensen, CTFA Senior Estate Settlement Associate and Alexandria Solis-Mullen, J.D., CTFA, Senior

Estate Settlement Officer Greenleaf Trust

10:10 - 11:00 a.m. Navigating Unique and Hard to

Value Assets

Jeffrey S. Kropschot, CTCP, Kropschot Consulting Partners, LLC

Adjourn

### MIDWEST TRUST AND WEALTH MANAGEMENT CONFERENCE

OCTOBER 16 - 18 | PLYMOUTH, MI

# REGISTRATION

| *Name: Title: *Bank/Firm: Address: City, State, Zip: *Email:                          |                           | _ *Name:                  |                |                       |   |                       |                                     |
|---|---------------------------|---------------------------|----------------|-----------------------|---|-----------------------|-------------------------------------|
|   |                           | . Title:                  |                |                       |   |                       |                                     |
|   |                           | Address:City, State, Zip: |                |                       |   |                       |                                     |
|   |                           |                           |                | *Required Information |   | *Required Information |                                     |
|   |                           |                           |                | CONFERENCE PRICIN     | G |                       |                                     |
|   |                           |                           |                |                       |   |                       | ATE REGISTRATION<br>AFTER OCTOBER 2 |
| OBL, MBA, IBA, WBA  | \$595                     |                           |                |                       |   |                       |                                     |
| Two or More (per person)<br>One Day Only<br>Golf                                      | \$495<br>\$395<br>\$75    | \$445                     |                |                       |   |                       |                                     |
| <b>EXHIBIT PRICING</b> Exhibit Booth (One Registration Included) Additional Exhibitor | \$1,195<br>\$395          |                           |                |                       |   |                       |                                     |
| TOTAL: \$   |                           |                           |                |                       |   |                       |                                     |
| METHOD OF PAYMENT   |                           |                           |                |                       |   |                       |                                     |
| Checks Made Payable to Mich   | nigan Bankers Associatio  | n                         |                |                       |   |                       |                                     |
| Charge my: ☐ ACH ☐ Name on Credit Card:   |                           |                           | □ Discover     |                       |   |                       |                                     |
| Credit Card Number:Signature:   |                           | Exp. Date                 |                |                       |   |                       |                                     |
| Contac  | t us at mbaregistrations( | @michigan.bank if         | paying by ACH. |                       |   |                       |                                     |

IT'S EASY TO REGISTER! Mail: 507 S Grand Ave. Lansing, MI 48933 Phone: (517) 485-3600 mbaregistrations@michigan.bank

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