

MIDWEST TRUST AND WEALTH MANAGEMENT *Conference*

OCTOBER 16 - 18 | SAINT JOHN'S RESORT
PLYMOUTH, MI



CO-SPONSORED BY:



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-not-miss 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.

9:30 - 10:20 a.m.

10:20 a.m.
10:30 - 11:00 a.m.
11:00 - 11:50 a.m.

Breakfast with Exhibitors
2024 Corporate Transparency Act
Patrick Alyward, Trustworthy Consultants LLC
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
Planning for Uncertainty: Modifying Trusts
Douglas A. Mielock, Foster Swift Collins & Smith PC
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
Reception with Exhibitors

11:50 a.m.
1:00 - 1:50 p.m.

1:50 - 2:40 p.m.

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

3:50 - 4:30 p.m.

4:30 p.m.

OCTOBER 18

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

9:20 - 10:10 a.m.

10:10 - 11:00 a.m.

Continental Breakfast with Exhibitors
Pricing Wealth Management - Enhance Revenue and Maximize Client Retention
Mike Dixon, Pohl Consulting and Training Inc.
Estate Settlement
Rachel Mortensen, CTFA Senior Estate Settlement Associate and Alexandria Solis-Mullen, J.D., CTFA, Senior Estate Settlement Officer Greenleaf Trust
Navigating Unique and Hard to Value Assets
Jeffrey S. Kropschot, CTCP, Kropschot Consulting Partners, LLC

Adjourn

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REGISTRATION

*Name: _____	*Name: _____
Title: _____	Title: _____
*Bank/Firm: _____	*Bank/Firm: _____
Address: _____	Address: _____
City, State, Zip: _____	City, State, Zip: _____
*Email: _____	*Email: _____

*Required Information

*Required Information

CONFERENCE PRICING

LATE REGISTRATION
AFTER OCTOBER 2

OBL, MBA, IBA, WBA	\$595 _____	\$695 _____
Two or More (per person)	\$495 _____	\$545 _____
One Day Only	\$395 _____	\$445 _____
Golf	\$75 _____	

EXHIBIT PRICING

Exhibit Booth (One Registration Included)	\$1,195 _____	
Additional Exhibitor	\$395 _____	\$425 _____

TOTAL: \$ _____

METHOD OF PAYMENT

Checks Made Payable to Michigan Bankers Association

Charge my: ☐ ACH ☐ MasterCard ☐ Visa ☐ AMEX ☐ Discover

Name on Credit Card: _____

Credit Card Number: _____ Exp. Date ____ / ____ CVV: _____

Signature: _____

Contact 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
michigan.bank