MIDWEST TRUST AND WEALTH MANAGEMENT *Conference*

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



CO-SPONSORED BY:

Michigan Bankers Association

INDIANA BANKERS ASSOCIATION

ILLINOIS BANKERS

OBL Ohio Bankers League

Wisconsin Bankers ASSOCIATION

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.	Tee Times
4:00 p.m.	Exhibitor Set-Up Open
7:00 p.m.	Welcome Mixer

OCTOBER 17

8:00 a.m.	Breakfast with Exhibitors
8:30 - 9:20 a.m.	2024 Corporate Transparency Act *Patrick Alyward, Trustworthy Consultants LLC*
9:30 - 10:20 a.m.	Economic Update *Steve Chiavarone, Federated*
10:20 a.m.	Exhibitor Introductions
10:30 - 11:00 a.m.	Break with Exhibitors
11:00 - 11:50 a.m	Real Estate in Trusts *Mark Harder, Warner Norcross + Judd*
11:50 a.m.	Exhibitor Introductions Continued and Lunch
1:00 - 1:50 p.m.	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.	Refreshment Break with Exhibitors
3:00 - 3:50 p.m.	Broker / Trust Panel Discussion *Panelists: Tom Hufton, The State Bank; Matt Moses, Southern Michigan Bank and Trust*
3:50 - 4:30 p.m.	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.	Continental Breakfast with Exhibitors
8:30 - 9:20 a.m.	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

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REGISTRATION

*Name: _____

Title: _____

*Bank/Firm: _____

Address: _____

City, State, Zip: _____

*Email: _____

*Required Information

*Name: _____

Title: _____

*Bank/Firm: _____

Address: _____

City, State, Zip: _____

*Email: _____

*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