

WHERE TRUST MEETS INNOVATION

Midwest Trust & Wealth Management Conference October 14–16
Ann Arbor Marriott Ypsilanti at Eagle Crest • Ypsilanti, Michigan

---

Join the Midwest's Leading Trust & Wealth Professionals
The Midwest Trust & Wealth Management Conference brings together trust officers, wealth advisors, estate planning professionals, investment managers, and financial leaders from across the Midwest for three days of education, networking, and innovative ideas that are shaping the future of fiduciary services. Connect with professionals from across the Midwest while building valuable relationships.

Co-hosted by:

- Michigan Bankers Association
- Illinois Bankers Association
- Ohio Bankers League
- Indiana Bankers Association

Featured Educational Sessions

- Economic Outlook: Current Conditions and What's Ahead
- Directed Trusts and Divided Fiduciary Roles
- Elder Fraud Scams
- Decanting & Trust Modification
- Case Law Update
- Common Trust Examination Findings
- From Overwhelmed to Optimized with AI

- Redefining the Client as "The Family"
- Selling Highly Appreciated Assets Without Capital Gains Tax
- Trust Administration Risks & Best Practices
- Protecting Assets from Long-Term Care Costs

Why Attend?

✔️ Learn from nationally recognized industry experts

✔️ Stay ahead of regulatory, fiduciary, and tax developments

✔️ Explore AI, investment strategies, and emerging trust trends

✔️ Earn continuing education credits

✔️ Meet industry partners in the Sponsor and Exhibitor Showcase

Agenda Overview
Wednesday, October 14
1:00 p.m. Tee Times
6:00 p.m. Welcome Mixer

Thursday, October 15
8:00 a.m. Welcome Breakfast
8:30 - Noon General Sessions
Noon Lunch
1:00 - 4:00 p.m. General Sessions
4:00 p.m. Reception with Exhibitors

Friday, October 16
7:30 a.m. Breakfast
8:00 - 11:00 a.m. General Sessions



Ann Arbor Marriott Ypsilanti at Eagle Crest
Nestled along the shores of Ford Lake, Eagle Crest offers beautiful lakeside accommodations, championship golf, and convenient access to Ann Arbor, creating the perfect setting for learning and networking.

Eagle Crest Marriott
1275 S Huron St, Ypsilanti, MI 48197
(734) 487-2000
Reserve online $189/night discounted room rate.

MIDWEST TRUST AND WEALTH MANAGEMENT CONFERENCE

OCTOBER 14-16| YPSIL ANTI, MI

REGISTRATION

*Name: _____

Title: _____

*Bank/Firm: _____

Address: _____

City, State, Zip: _____

*Email: _____

*Name: _____

Title: _____

*Bank/Firm: _____

Address: _____

City, State, Zip: _____

*Email: _____

Required Information

CONFERENCE PRICING

OBL, MBA, IBA,	$595	_____
Two or More (per attendee)	$495	_____
One Day Only	$395	_____
Golf	$100	_____
Exhibit Booth (includes one full registration)	$1,295	_____
Additional Exhibitor Fee	$395	_____
	TOTAL:	$_____

METHOD OF PAYMENT

Checks Made Payable to Michigan Bankers Association

☐ ACH ☐ MasterCard ☐ Visa ☐ AMEX ☐ Discover

Name on Credit Card: _____

Credit Card Number: _____

Exp. Date ____ /____ CVV: _____ Zip Code: _____

Signature: _____

Contact us at mbaregistrations@michigan.bank if paying by ACH.

Michigan Bankers Association
507 S. Grand Ave. Lansing, MI 48933 (517) 485-3600
mbaregistrations@michigan.bank