MIDWEST TRUST AND WEALTH MANAGEMENT *Conference*

OCTOBER 11 - 13 | PLYMOUTH, MI



CO-SPONSORED BY:

Michigan Bankers Association

Indiana Bankers Association

Illinois Bankers

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

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

The Saint John's Resort is just 20 minutes north of Detroit Metropolitan Airport, 30 minutes from downtown Detroit, and 15 minutes from Ann Arbor. Please make reservations within our room block at (734) 414-0600 or by visiting www.saintjohnsresort.com. Please use group code: **MT102622A.** Our room block cut-off date is: **SEPTEMBER 20.**

Midwest Trust and Wealth Management Direct Booking Link

EXHIBITOR AND SPONSOR OPPORTUNITIES

Contact Stephanie Fisher at sfisher@michigan.bank or (517) 285-5117.

CTFA and CFP credits are pending approval.

TENATIVE AGENDA

OCTOBER 11

4:00 p.m.	Exhibitor Set-Up
6:00 p.m.	Welcome Reception

OCTOBER 12

8:00 a.m.	Breakfast with Exhibitors
8:30 - 9:20 a.m.	Washington Update *Tim Keehan, Vice President, Fiduciary Trust & Investments American Bankers Association*
9:30 - 10:20 a.m.	SECURE Act 2.0 *Alicia Cole, CFP®, Senior Manager, Estate Planning, Plante Moran, PLLC*
10:20 a.m.	Exhibitor Introductions
10:30 - 11:00 a.m.	Break with Exhibitors
11:00 a.m.-12:10 p.m	Trust Examiner Panel *Jeff VanNoord, Senior Trust Examiner, FDIC; Clare Rosati, Bank Examiner and National Trust Bank Team, OCC; Zach Ball, Supervisory Examiner, Trust Activities, DIFS; Mary Wasek, Lead Risk Management Specialist, Supervision and Regulation Federal Reserve Bank of Chicago* *Moderator: Bruce Ohland, Regional Supervisor – Trust Activities, DIFS*
12:10 p.m.	Exhibitor Introductions continued and Lunch
1:10 - 2:00 p.m.	Economic Update *Gary Wolfram, William Simon Professor of Economics and Public Policy, Director of Economics, Hillsdale College*
2:10 - 3:00 p.m.	Special Needs Trust *Amy Tripp, Attorney, Chalgian and Tripp*
3:00 - 3:30 p.m.	Refreshment Break with Exhibitors
3:30 - 4:20 p.m.	Staying up to Date on Technology/Digital Assets *Mike Tropeano, CFA, AIF, Senior Director, Broadridge Financial Consulting*
4:30 p.m.	Reception with Exhibitors

OCTOBER 13

8:00 - 8:30 a.m.	Continental Breakfast with Exhibitors
8:30 - 9:20 a.m.	All things HSAs! *Ascensus*
9:20 - 10:20 a.m.	New Trust Cases *Terrence G. Quinn, Esq, The TGQ Law Firm*
10:20 - 10:40 a.m.	Refreshment Break with Exhibitors
10:40 - 11:30 a.m.	The Family Dynamics of Intergenerational Wealth *Vanguard*
11:30 a.m.	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 SEPTEMBER 29	
OBL, MBA, IBA, WBA	$495	_____	$495	_____
Two or More (per person)	$395	_____	$445	_____
One Day Only	$295	_____	$345	_____

EXHIBITOR PRICING

Exhibitor Booth (One Registration Included)	$995	_____		
Additional Exhibitor	$295	_____	$325	_____

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
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