

The Latest in Estate Administration



June 25, 2019
SHAZAM Education Center
CBAI Headquarters
Springfield, IL

Course Introduction

Estate tax avoidance is only the tip of the iceberg in estate administration. Roger and Becky cover the basics of estate administration, types of beneficiaries and their issues, checklist information, associated risks, investment responsibilities, and fiduciary and income tax opportunities that can still make our participation as Trust departments very meaningful.

This is a participative program, so bring plenty of your own questions and examples.

Who Should Attend?

Trust administrators, trust sales and compliance officers would all benefit from attending this seminar.

About the Presenters

What Others Have Said:

"I love Becky and Roger and ALWAYS take away usable information critical to trust operations and beneficial to my bank."

*Barbara Jacobs,
SVP & Trust Officer
Bank of Herrin*

"Roger and Becky have a lot of experience to share. This program is a great resource for someone newer to the trust industry, such as myself."

*Matt Hunter,
Trust Officer
State Bank of Graymont*

"Very engaging. They used relevant and current topics and related them to our business."

*Amanda Walter
Assistant Trust Officer
The First National Bank
in Amboy*

"Great learning experience!"

*Debra Gudeman
Trust Officer
First Trust & Savings Bank,
Watseka*

Becky T. Kelly is a partner in The Fiduciary Education Center, LLC. Kelly most recently managed a community bank trust company. Previously, she was with Campbell University in its Trust Program creating an Executive Training Program and serving as trust placement officer. Prior to working with Campbell, Kelly was with Bank of America and its predecessors for 24 years in its Wealth Management Area. She is the dean of the Southeastern Trust School and executive director of the Trust Education Foundation, Inc. She has been in the trust field for more than 30 years. Kelly holds a B.S. from Longwood College, Farmville, VA, and an M.B.A. from James Madison University, Harrisonburg, VA, as well as being a Certified Financial Trust Advisor. She is a graduate of Southeastern Trust School, National Graduate Trust School, and Cannon Trust Schools I, II and III.

Roger A. Pond is a partner in The Fiduciary Education Center, LLC, which was established in 2002. Pond and Becky Kelly develop their own course curricula using Campbell University and its extensive Trust Library as a resource. Pond is a professor emeritus of the Trust Program at Campbell University, Buies Creek, NC, the only university to offer a trust degree in the United States. During Pond's 30-year trust career, he managed personal trust, employee benefits, corporate trust, and trust support areas including tax, real estate, and endowments and foundations. He is the assistant director of The Southeastern Trust School and the Certifying Trust Bankers School at Pinehurst, as well as a director of the Trust Education Foundation, Inc. and a member of the Duke Estate Planning Council. He holds a B.A. from Duke University, Durham, NC, and a J.D., *cum laude* from Washington and Lee University in Lexington, VA.

Pond and Kelly recently completed a Sheshunoff manual called *Trust Department Risk Management - Preparing for an Exam*. Both are active in teaching in the Accredited Trust Financial Advisor and Accredited Trust Operations Specialist designations offered through Campbell University and AccuTech University as well as the CTFA and other individually developed fiduciary training programs.

Key Topics

- Why using a professional trustee still makes sense
- The administrative responsibilities of an Executor
- The acceptance process
- Outright vs. managed
- Decisions regarding the associated risks
- Tax work can create substantial savings



Registration Fees

Fees include hand-out materials, refreshment breaks and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

Cancellation Policy

Registrants cancelling two days prior to each seminar receive 100% refund; one day prior, 50%; the day of the seminar, no refund. **All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all “no shows.”**

CBAI MEMBER

One person	\$265
Two or more from same banking institution	\$245 each

****PROSPECTIVE-MEMBER**

One person	\$465
Two or more from same banking institution	\$445 each

CDD members receive a 10% discount.

****Only financial institutions/firms eligible for CBAI membership.**

Registration Form

THE LATEST IN ESTATE ADMINISTRATION
JUNE 25, 2019

Please Print

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

E-Mail _____

(E-mail addresses are required for registration).

Name/Title _____

E-Mail _____

(E-mail addresses are required for registration).

I have special needs, please contact me before the seminar.

Please select your payment method.

Check Enclosed Check in Mail

Pay at Door Credit Card*

**If you are paying by credit card, please fill out the following information.
(Visa, MasterCard & Discover accepted).*

Name as It Reads on Card _____

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Billing Address of Card _____

Card Number _____ Exp. Date _____

Three Digit Security Code _____



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901 Community Drive
Springfield, IL 62703-5184



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Call it in:
(800) 736-2224 (Illinois only)
(217) 529-2265

Date and Location

June 25, 2019

SHAZAM Education Center
CBAI Headquarters
901 Community Drive
Springfield, IL 62703
217/529-2265

Agenda

Registration begins at 8:30 a.m. The seminar runs from 9 a.m. to approximately 4 p.m. A Continental breakfast and lunch are provided.

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider by the Illinois Dept. of Financial and Professional Regulation.

For More Information

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