MIDWEST TRUST AND WEALTH MANAGEMENT *Conference*

OCTOBER 12 - 14 | 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

The Inn at St. John's
44045 Five Mile Road
Plymouth, MI 48170

The Inn at St. John's 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.theinnatstjohns.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@mibankers.com or (517) 342 9057.

AGENDA

OCTOBER 12

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

OCTOBER 13

8:30 a.m.	**Breakfast with Exhibitors –** *a plated breakfast will be served*
9:00 - 10:00 a.m.	**Washington Update** *Tim Keehan, Vice President & Senior Counsel, American Bankers Association*
10:00 - 10:50 a.m.	**Revisiting the SECURE Act** *Alicia Cole, CFP®, Senior Manager, Estate Planning, Plante Moran, PLLC*
10:50 - 11:15 a.m.	**Break with Exhibitors**
11:15 a.m. - Noon	**IRA Beneficiary Payout Options** *Ascensus*
Noon	**Roundtable Luncheon Exhibitor Introductions continued**
12:50 - 1:40 p.m.	**Uniform Power of Attorney Act** *Alex Mallory, McCurdy Wotila & Porteous, PC*
1:40 - 2:30 p.m.	**Value Oriented Investment Philosophies and Strategies** *Dimensional Fund Advisors*
2:30 - 3:00 p.m.	**Refreshment Break with Exhibitors**
3:00 - 3:50 p.m.	**Intergenerational Wealth Transfer** *Jean Dunn, CTFA, T. Rowe Price*
3:50 - 4:50 p.m.	**Help Clients Maximize Their Social Security Benefits** *Andy Robertson, Corporation for Social Security Claiming Strategies; Steve Hall, Athene Wealth Management*
5:00 - 6:00 p.m.	**Reception with Exhibitors**

OCTOBER 14

8:00 - 8:30 a.m.	**Continental Breakfast with Exhibitors**
8:30 - 9:20 a.m.	**Economic Outlook** *Linda Duessel, CFA, CPA®, CFP® Senior Vice President, Senior Equity Strategist, Federated Hermes*
9:20 - 10:10 a.m.	**Financial Services Firms Approach to Medicare Guidance** *Danny Streiff, Director, Business Development – Financial Channel, eHealth*
10:10 - 10:40 a.m.	**Refreshment Break with Exhibitors**
10:40 - 11:30 a.m.	**New Trust Cases** *Terrence G. Quinn, Esq, The TGQ Law Firm*
11:30 a.m.	**Lunch**
12:15 - 1:00 p.m.	**The Value of Advice** *Vanguard*
1:00 – 1:45pm	**Unique and Hard to Value Assets** *Kevin Maas, President of Wealth Management Compliance Alliance™, a division of Pohl Consulting and Training*
1:45 – 2:30pm	**Risk Rating Trust Accounts** *Kevin Maas, President of Wealth Management Compliance Alliance™, a division of Pohl Consulting and Training*

MIDWEST TRUST AND WEALTH MANAGEMENT CONFERENCE

OCTOBER 12 - 14 | PLYMOUTH, MI

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 SEPTEMBER 27	
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@mibankers.com if paying by ACH.

IT'S EASY TO REGISTER!
Mail: 507 S Grand Ave.
Lansing, MI 48933

Phone: (517) 485-3600
mbaregistrations@mibankers.com
mibankers.com