TENNESSEE BANKERS ASSOCIATION Service Since 1890

Trust and Wealth Management Conference

OCTOBER 19 & 20, 2017
TBA BARRETT TRAINING CENTER
NASHVILLE

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LINDSEY

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Richard Tomichek, Jr, Partner, Carr, Riggs & Ingram, LLC, Nashville

Emily Walker, Trust Officer, Commercial Bank & Trust Co, Paris

Schedule

Thursday, October 19

NOON **REGISTRATION**

Light lunch available

12:55 p.m. **WELCOME**

*Chairman **Scott Lindsey**, Senior Vice President/Trust Advisor, Pinnacle Bank, Nashville, Tenn.*

1:00 p.m. **ETHICS OF TRUST**

***Jason Long, Esq.**, Lowe, Yeager and Brown PLLC, Knoxville, Tenn.*

Jason Long will discuss the ethical obligations for attorneys in the planning, formation, and administration of trusts.

2:00 p.m. **FEDERAL UPDATE**

***Timothy Keehan**, VP/Senior Counsel, Center for Securities Trusts & Investments, American Bankers Association, Washington, D.C.*

The federal financial agencies continue to implement major regulatory initiatives that impact the bank's trust and wealth management business. Timothy Keehan will explain recent federal legislative and regulatory developments.

3:00 p.m. **BREAK**

*Sponsored by **Reich & Tang**, New York, N.Y.*

3:15 p.m. **GENDER AND GENERATIONS: RESHAPING THE INVESTMENT CONVERSATION**

***Anne Durkin**, CFA, Portfolio Manager, Main Street Advisors LLC, Chicago, Ill.*

Understanding your clients and their unique investing needs is perhaps the best way to retain and grow relationships. Anne Durkin will highlight the role of the advisor in structuring investment conversations with both millennial investors and female investors. She will present strategies for appropriately connecting with female clients—from intergenerational investment planning to marketing and communication. Durkin will also discuss the unique characteristics of the millennial investor and how they will manage the $30 trillion in wealth that is expected to transfer from Baby Boomers to millennials over the next 30 years. Understanding these niche market segments and their views on money is essential to developing relationships and offering investment advice that fits their needs.

4:15 p.m. **_ISSUES IN ELDER LAW_**

Timothy L. Takacs*, CELA® Takacs McGinnis Elder Care Law, PLLC, Hendersonville, Tenn.*

Certified by the National Elder Law Foundation as a Certified Elder Law Attorney and by the State of Tennessee as an Elder Law Specialist, Tim Takacs was one of the first elder law attorneys in the nation to assemble an interdisciplinary team of experts to provide integrated client care. His innovations have transformed the practice of elder law in the United States and have set a new standard of excellence in the field.

5:30 p.m. **_RECEPTION_**

Sponsored by ***ProxyTrust****, Islandia, N.Y.*

6:30 p.m. **_DINNER/ENTERTAINMENT_**

Sponsored by ***Federated Investors****, Pittsburgh, Pa.*

This year's conference features three talented songwriters who have worked with a number of artists to create some huge hits.

Bobby Tomberlin – Bobby wrote "One More Day" by Diamond Rio, "A Good Day To Run" by Darryl Worley and "Country" with Mo Pitney and Bill Anderson. He has also had songs recorded by Barbra Streisand, Blake Shelton, Willie Nelson, Faith Hill, Kenny Rogers, and many others.

Phillip White – Phillip wrote "I'm Movin' On" by Rascal Flatts, "I'm A Survivor" by Reba McEntire, "Billy's Got His Beer Goggles On" by Neil McCoy, "Nobody But Me" by Blake Shelton and "The Trouble With Girls" by Scotty McCreery. Phillip has also had numerous cuts for other artists.

Stephony Smith – Stephony wrote "Johnny And June" by Heidi Newfield, "It's Your Love" by Tim McGraw and Faith Hill, "Perfect Love" by Trisha Yearwood, "How Was I To Know" by Reba McEntire, "Yes" by Chad Brock, "Back When" by Tim McGraw and "Big Star" by Kenny Chesney. Stephony has more than 100 cuts by artists such as Shania Twain, Barbara Streisand, and Diamond Rio.

Friday, October 20

7:30 a.m. **_BREAKFAST_**

Breakfast sponsored by ***Broadridge Financial Solutions Inc****, New York, N.Y.*

8:30 a.m. **_STATE UPDATE_**

Greg Gonzales*, Commissioner, Tennessee Department of Financial Institutions, Nashville, Tenn.*

9:00 a.m. **FIDUCIARY LIABILITY AND OTHER TRENDS**

***Paul Gontarek**, Attorney-At-Law, Howard Mobley Hayes & Gontarek, PLLC, Nashville, Tenn.*

This program reviews trends within the area of fiduciary and other probate and trust litigation. As part of his review, Paul Gontarek will look at drafting, implementation options, and administration techniques that can be used in order to reduce chances of litigation and exposure.

10:00 a.m. **BREAK**

*Sponsored by **BNY Mellon/Dreyfus**, New York, N.Y.*

10:10 a.m. **ELECTION OF TRUST COMMITTEE CHAIRMAN**

10:15 a.m. **2017 TAX UPDATE**

***Brad Dunlavy**, CPA, Senior Vice President, Truxton Trust, Nashville, Tenn.*

Brad Dunlavy will provide a review of recent tax rulings, cases, legislation, and potential tax law changes that affect wealth management professionals and their clients.

11:15 a.m. **ECONOMIC UPDATE**

***Linda Duessel**, Senior Vice President/Senior Equity Strategist, Federated Investors, Pittsburgh, Pa.*

As Senior Equity Strategist, Linda Duessel works as part of the team responsible for formulating Federated's views about various equity market conditions and the firm's positioning strategies. In addition, she is responsible for articulating the strategy, process, positioning, and performance of Federated's equity portfolios.

12:15 p.m. **ADJOURN**

Thank You to Our Sponsors

BNY Mellon/Dreyfus, New York, N.Y., *Friday Morning Break*
Broadridge Financial Solutions Inc., New York, N.Y., *Breakfast*
Federated Investors, Pittsburgh, Pa., *Dinner and Entertainment*
MainStreet Advisors, Chicago, Ill., *General Sponsor*
Infovisa, Cornelius, N.C., *General Sponsor*
ProxyTrust, Islandia, N.Y., *Reception*
Reich & Tang, New York, N.Y., *Thursday Afternoon Break*
Voya Investment Management, New York, N.Y., *General Sponsor*
Wright Investors' Service, Inc., Greenwich, Conn., *General Sponsor*

HOTEL INFORMATION

TBA is holding a block of rooms at the Fairfield Inn & Suites Nashville MetroCenter (100 French Landing Drive) for $139 per night. **Please book before the deadline of October 2.** The rooms may sell out before the cutoff date. Please call 615-432-4677 or reserve online at the following link: ***http://bit.ly/2uASvD2***

Other hotels in close proximity are Candlewood Suites (270 Venture Circle), 615-787-8787, and Springhill Suites (250 Athens Way), 615-244-5474. Ask for the Tennessee Bankers Association rate. Blackout dates apply.

CONFERENCE FEES

TBA Members / Associate Members		Member Spouses/ Guests	Nonmembers	Nonmember Spouses/Guests
Early Registration	$345	$90	$690	$180
Early registration deadline is October 5.				
Registration	$375	$120	$750	$240
Day-of-Program	$425	$175	$850	$350

Fee includes instruction, instructional materials; reception, lunch, and entertainment on Thursday; breakfast on Friday; and refreshment breaks on both days. No written confirmation of seminar registration will be sent from the TBA. Participation in TBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or nonmember rates.

GENERAL INFORMATION

TNBankers.org/education/events has information on attire, special needs, cancellation policy, inclement weather policy, continuing education credit information, photo policy, and antitrust policy.

CONTINUING EDUCATION CREDIT

TBA's 2017 *Trust and Wealth Management Conference* has been approved for:

9 hours—Continuing Professional Education (CPE) credit in the area of Specialized Knowledge.

1 hour, Dual; 6.5 hours, General—Continuing Legal Education (CLE) credit

7.5 hours—Certified Financial Planner (CFP) credit

8.75 hours—Institute of Certified Bankers (ICB) credit/Certified Trust and Financial Advisor (CTFA) credit. This statement should not be viewed as an endorsement of this program or its sponsor. ICB Members must report these credits at *aba.csod.com*.

FOR MORE INFORMATION CONTACT

Penny Powlas
Executive Assistant, Administration / Legal
ppowlas@TNBankers.org
800-964-5525 or 615-244-4871 • Fax: 615-324-1987

2017 Trust & Wealth Management Conference

OCTOBER 19 & 20
TBA BARRETT TRAINING CENTER, NASHVILLE

Please print or type. List name and badge nickname for each attendee. Check space if registrant is a spouse.

Must be included for delegates. For educational tracking only.
LAST 4 DIGITS ONLY:

Name:__________ Nickname __________ Spouse ☐ Email__________ SS#___ ___ ___ ___

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Registration	$375	$120	$750	$240
At-the-door	$425	$175	$850	$350

2 WAYS TO REGISTER!

1. Register online with a credit card or ACH at *www.TNBankers.org.*

2. Mail this form, along with a check, to the address on the right.
Please make check payable to Tennessee Bankers Association.

Mail form and payment:
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Attn: Penny Powlas
211 Athens Way, Ste 100
Nashville, TN 37228-1381
615-244-4871 or 800-964-5525
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