

**2010 Delaware Trust Conference**  
***Navigating Rough Seas***  
***Agenda – As of September 17, 2010***

2010 Delaware Trust Conference -Program Details

**LEARNING OBJECTIVES:** To further the understanding of the unique aspects of Delaware Trusts for the benefit of trust professionals to assure that their trust clients receive the most timely, knowledgeable and beneficial advice to maximize their trust needs.

**PROGRAM CONTENT:** Use the Delaware Advantage to Guide Your Trust Clients Through Rough Seas! The 2010 Delaware Trust Conference focuses solely on the unique aspects of the Delaware trust industry. Over 50 national and international trust, legal, and accounting experts will present on topics specific to personal and corporate trusts in this singular venue for trust and wealth management professionals, attorneys, CPAs and others in related fields. See the inside of this brochure for Daily Agenda and Speakers and the attached Registration Form.

**PROGRAM LEVEL:** Intermediate

**PROGRAM PREREQUISITES:** None

**ADVANCE PREPARATION:** None

**DELIVERY METHOD:** Panel discussions with PowerPoint supplements. All materials presented are provided to attendees in hardcopy format as well as on a USB flash drive.

**CONTINUING EDUCATION CREDITS:** Attendees can earn up to 17.0 continuing education credits, including 2.0 ethics credits.

**Tuesday, November 30<sup>th</sup> All At Sea – How do trust professionals navigate the current economic conditions, and where should we steer our estate planning businesses?**

**8:30 a.m. - Registration**

**OPENING GENERAL SESSION – with continental breakfast**

**9:00 – 9:30 a.m. (.5 Hours) Pre-Conference Overview: Charting the Course:** Hear a top captain of the Delaware trust industry discuss how to chart a course through current estate planning uncertainty, the solutions offered in Delaware, and how these strategies will unfold over the next two days.

Interviewer: **Jurgen Hasenpflug, J.D., CTFA**, Vice President, Regional Trust Adviser, SunTrust Delaware Trust Company

Speaker: **Richard W. Nenzo, Esq.**, Managing Director & Trust Counsel, Wilmington Trust

**BREAK – 9:30 – 9:45 a.m.**

**GENERAL SESSION**

**9:45 – 11:15 a.m. (1.5 Hours) Delaware as a Jurisdiction For International Planning: Past, Present, Future.** A look at Delaware as an international center. Topics covered will include common planning techniques using Delaware, why an international bank would set up a Delaware trust company, the impact of the global transparency initiatives on Delaware and how Delaware compares as an asset protection jurisdiction with its offshore competitors

Moderator: **Gavin F. Leckie**, Managing Director, Head of the Cross Border Advisory Team,  
JPMorgan Private Bank (New York)

Panelist: **Christina M. Baltz**, Managing Director, Head of Wealth Planning, Americas, UBS (New York)

Panelist: **Richard J. Hay**, Partner, Stikeman Elliott (London)

Panelist: **Rob Withecombe**, Head of Wealth Advisory, Barclays Wealth (London)

Panelist: **Jonathan Gopman**, Principal, Cummings & Lockwood LLP (Naples, FL)

**BREAK – 11:15 – 11:30 a.m.**

**BREAK-OUT SESSIONS ( 3 sessions)**

**11:30 – 1:45p.m. (2 Hours) Lunch and Learns:** 11:30a.m. – 12:30p.m. & 12:45p.m. – 1:45p.m. (Note:12:30 – 12:45 Refresh rooms/ place trashcans for box lunches near meeting rooms)

**1. Why Choose Delaware?** How to market estate planning services in general and, in particular, Delaware Trust planning even when your business or practice is outside of Delaware.

Speaker: Jamie Hargrove, Attorney, AEP®, CPA, Stoll Keenon Ogden PLLC

**2. Repatriation of Trusts:** A discussion on the process of bringing offshore trusts to the United States.

Speaker: Ian Weinstock, Esq., General Counsel, UBS Trust Company, N.A.

**3. The View from the Masthead: An Economic Forecast:** A review of current economic conditions and a forecast for future trust formation prospects.

Speaker: James J. Fitzgerald, IV, Vice President, Private Wealth Management, Investment Management Division Goldman, Sachs & Co.

**BREAK – 1:45 – 2:00 p.m.**

### **GENERAL SESSION**

**2:00 – 3:30p.m. (1.5 Hours) Making Delaware Your Home Port:** A discussion about the benefits of Delaware business entities and their use in trust planning.

Moderator: Doneene Keemer Damon, Esq., Director, Richards, Layton & Finger, P.A.

Panelist: Mark D. Olson, Esq., Partner, Morris James LLP

Panelist: Douglas T. Coats, Esq., Associate, Young Conaway Stargatt & Taylor, LLP

Panelist: Richard J. Geisenberger, Asst. Secretary of State, Delaware

Panelist: Robert F. Frier, Director and Business Manager, Deutsche Bank National Trust Company

**BREAK – 3:30 – 3:45 p.m.**

### **GENERAL SESSION**

**3:45 – 5:15 p.m. (1.5 Hours) To Be Announced**

**5:15 – 6:00 p.m. Reception**

**6:00 – 7:00 p.m. Dinner**

**7:00 – 8:00 p.m. (1 Hour)**

**SPEAKER: Chancellor William B. Chandler III, Delaware Court of Chancery**

Total Credits for Tuesday: 8

## **Wednesday, December 1<sup>st</sup> -**

**Making Landfall – Having arrived in Delaware, how do we best utilize the local resources to the best advantage?**

**7:30 a.m. - Registration**

### **OPENING GENERAL SESSION**

#### **GENERAL SESSION – with continental breakfast**

**8:00 – 9:00 a.m. (1 Hour) New in Port:** a practical discussion about moving a trust to Delaware and how to run it thereafter (to include decanting, reformation, practical administration advice).

Delaware Novice: Nicole St. Amand, CTFA, Assistant Vice President, Christiana Bank & Trust Company

Expert #1: Thomas M. Forrest, CPA, President, Personal Trust Services, Charles Schwab Bank

Expert #2: **Todd A. Flubacher, Esq.**, Partner, Morris Nichols Arsht & Tunnell LLP

**BREAK – 9:00 – 9:10 a.m.**

**GENERAL SESSION**

**9:10 – 10:40 a.m. (1.5 Hours) Navigating Towards the Right Result:** The Use of Delaware Statutory Trust for Personal Trust Planning.

Moderator: **Charles J. Durante, Esq.**, Partner, Connolly Bove Lodge & Hutz LLP

Panelist: **Steven Director, Esq.**, Director, Bayard

Panelist: **Julia B. Fisher, J.D., LL.M.**, Managing Director- J.P. Morgan Private Bank

Panelist: **Mark V. Purpura, Esq.**, Director, Richards, Layton, & Finger, P.A.

**BREAK 10:40 – 10:50 a.m.**

**GENERAL SESSION**

**10:50 a.m. – 12:20 p.m. (1.5 Hours) Taking Orders from the Captain - Directed Trust:** A practical discussion of the issues related to being a directed trustee including: communication with advisers, ensuring compliance with the trust document, retaining sufficient nexus to Delaware, and other practical tips.

Moderator: **Michael M. Gordon, Esq.**, Gordon, Fournaris & Mammarella, P.A.

Panelist: **Cynthia D.M. Brown, Esq.**, President, Commonwealth Trust Company

Panelist: **Michael A. Friedberg, Esq.**, Trust Counsel, Charles Schwab Bank

Panelist: **George W. Kern, Sr. Esq.**, Trust Officer/Assoc. Fid. Counsel, Bessemer Trust Company of Delaware, N.A.

Panelist: **Richard J. Immesberger**, Executive Vice President, WSFS Bank

**BREAK 12:20 – 12:30 p.m.**

**BREAK-OUT SESSIONS**

**12:30 – 2:40 p.m. ( 2 Hours) Lunch and Learns (3 Sessions) First Session 12:30 – 1:30p.m. & Second Session 1:40 – 2:40 p.m.**

**1. Taxes Off the Port Bow!** A discussion of recent changes in the tax code and how they are affecting trusts.

Speaker: **Diane M. Burke, CPA, MBA, AEP**, Director, Cover & Rossiter

**2. A Law in Every Port – A Legislative Update:** A Review of 2010 Delaware Trust Legislation and a Preview of Anticipated Delaware Trust Legislative Initiatives in 2011.

Speakers: **Miguel D. Pena, Esq.**, Partner, Fox Rothschild LLP

**3. Court Petitions:** A discussion regarding consent petitions and petitions for instructions with the Court of Chancery. A practical guide to when and how you should file.

Speakers: **Norris P. Wright, Esq.**, President & Trust Counsel, U.S. Trust Company of Delaware

**BREAK 2:40 – 2:50 p.m.**

**GENERAL SESSION**

**2:50 p.m. – 3:50 p.m. (1 Hours) Hidden Treasures:** A presentation highlighting less well known, but equally impressive, features and uses of Delaware Trusts, including: expatriation trusts; "silent trusts;" asset protection for CRTs, GRITS, GRATS, and QPRTS; use as a prenup alternative; and trust opportunities with captives.

Moderator: **Anne Marie Levin, J.D., LL.M.**, Vice President and Delaware Advantage Trust Specialist, PNC Wealth Management

Panelist: **Douglas Lundblad, J.D., LL.M., CFP**, Senior Vice President, Wells Fargo Delaware Trust Company

Panelist: **Jeffrey K. Simpson, Esq.**, The Stewart Law Firm

Panelist: **Melanie Warren, J.D., CTFA**, Vice President and Senior Wealth Planner, PNC Wealth Management

Panelist: **Michael J. Stegman, Esq.**, Kohnen & Patton, LLP, Cincinnati, Ohio

**BREAK 3:55 – 4:10 p.m.**

**GENERAL SESSION**

***4:00 p.m. – 6:00 p.m. (2.0 Hours)***

***Ethics Panel:*** an interactive case study looking at directed trusts and the liability surrounding the following of investment and distribution adviser directions.

Moderator: **Lisa Parry Howard, Esq.**, VP, Personal Trust, Christiana Bank & Trust

Panelist: **Beverly Wik, Esq.**, Director, Old Capital Law Firm

Panelist: **Robert E Crowe**, Director, Cooch & Taylor, P.A.

Panelist: **Peter S. Gordon, Esq.**, LL.M, Director, Gordon, Fournaris & Mammarella, P.A.

Panelist: **Matthew J. Lynch**, Chief Compliance Officer, New York Private Bank & Trust Company

Total Credits for Wednesday: 9

***Total Credits for Conference: 17 (including 2.0 Ethics Credits)***