Delaware Bankers Association and Delaware Financial Education Alliance present…

Foundations of Delaware Trusts 2018

Four All New Sessions for 2018!

University & Whist Club
805 N Broom St, Wilmington, DE 19806

Conveniently Scheduled in 4 two-hour sessions
March 28th through April 25th - 9 a.m. to 11 a.m.

Recognizing Grantor Trust Issues - March 28th

A review of what can cause a change in grantor trust status, what red flags an administrator should be looking for, as well as when and what questions to ask.

Instructors: **David Diamond, President, The Northern Trust Company of Delaware**
George Kern, Managing Director, Regional Director, and Senior Fiduciary Counsel, Bessemer Trust Company

Foundations in International Trusts - April 4th

The basics on how to work with international clients and explanation of basic planning techniques for international clients.

Instructors: **David Manni, Vice President, JPMorgan Trust Company of Delaware**
Charles Durante, Partner, Connolly Gallagher LLP

Quarterbacking the Trust Relationship - April 11th

Discussions regarding best practices for trustees in (1) understanding the family's planning, personal and funding goals, and (2) coordinating trust advisers (including tax preparers, advisers, money managers and co-trustees).

Instructors: **Daniel Hayward, Director, Gordon, Fournaris & Mammarella, P.A.**
Michael Neri, Managing Director, U.S. Trust Company of Delaware

Investment Basics - April 25th

A primer on the typical types of investments permissible in trust accounts meant to satisfy the CTFA requirements for investment credits.

Instructors: **Gregory Wood, Vice President, The Northern Trust Company of Delaware**
Margaret F. Creed, CFP®, CFA, Vice President and Chief Portfolio Strategist, Wilmington Trust Company

Attend All Four and SAVE or Pick and Choose!

Each Session Will Also Be Available on an Audio/Slide Flashdrive for In-House Training

See the Attached Form for Registration Info!

DBA Delaware Bankers Association

Delaware Bankers Association Financial Education Alliance

Foundations of Delaware Trusts 2018

Registration Form

Delaware Bankers Association

Delaware Bankers Association Financial Education Alliance

Space is Limited! Sign Up Today!

All registrants will receive a confirmation, via email. Please complete a separate form for each registrant. Anyone withdrawing within 10 days of a session will be charged the full student fee. Substitutions are permitted at any time.

Name: ______________________________ Badge Name: ______________________________

Title: ______________________________ Bank/Company: ______________________________

Address: ____

City: ______________________________ State: ____________ Zip Code: ______________________________

Business Phone: ______________________________ Cell Phone: ______________________________

Email: ____

I will be attending:	Members	Non-Members	
☐ All 4 sessions	$699 / $1,199*	$899 / $1,399*	$ ____________
☐ Recognizing Grantor Trust Issues 3/28/18	$199 / $349*	$299 / $449*	$ ____________
☐ Foundations in International Trusts 4/4/18	$199 / $349*	$299 / $449*	$ ____________
☐ Quarterbacking the Trust Relationship 4/11/18	$199 / $349*	$299 / $449*	$ ____________
☐ Investment Basics 4/25/18	$199 / $349*	$299 / $449*	$ ____________
		Total	$ ____________

* Includes session on Flashdrive. Each session will have its own file with the PowerPoint and synchronized audio.
Fee includes continental breakfast, breaks, and all materials. Each session begins at 9:00 a.m. and ends by 11:00 a.m.

Dietary Restrictions & Special Needs (Please State): ______________________________

REGISTRATION PAYMENT INFORMATION

- ☐ Check enclosed payable to: ***Delaware Financial Education Alliance***
- ☐ Check will follow
- ☐ Please bill the name and address above
- ☐ Pay by Credit Card (complete the information below)

Account Name: ______________________________ ☐ Visa ☐ MasterCard ☐ Discover

Account Number: ______________________________ Expiration Date: ___/___

Signature: ____

Location:
The University & Whist Club
805 N Broom St, Wilmington, DE 19806

Return Completed Form to:
email: renee.rau@debankers.com
Fax: 302-678-5511, or
Mail: DBA/FEA
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