Day 1 - Tuesday - October 18th

Note: All Sessions Are Available for Live Streaming.

7:45 - 8:30 a.m. - Registration

8:30 - 10:00 a.m. - Plenary Session 1 (90 minutes) - Group Live 2 CTFA, CRSP

What The Cool Kids Are Doing, Current Trends In Estate Planning – In light of recent developments, some estate planning strategies have become especially popular. This presentation explains and evaluates several "hot" planning ideas, including spousal lifetime access trusts, charitable remainder trusts as beneficiaries of retirement accounts, ultra-long-term GRATs, and incomplete gift nongrantor trusts.

- **Samuel A. Donaldson, Professor of Law, Georgia State University**

10:00 - 10:20 a.m. - Welcome / Break - Governor's Hall with Exhibitors

10:20 - 11:20 a.m. - Plenary Session 2 (60 minutes) - Group Live 1.25 CTFA, CRCM, CSOP

Crypto and Digital Assets - *With almost 20% of Americans holding some crypto currencies and the federal government getting ready to issue more regulations and adopt legislation about them. This is a critical asset class for estate planners. This presentation will discuss what they are, how they work and the best ways to deal with them in estate planning and administration.*

- **Jonathan Blattmachr, Principal, Pioneer Wealth Partners**

11:20 - 11:30 - Break - Governor's Hall with Exhibitors

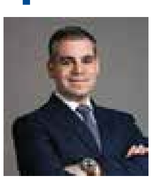
11:30 a.m. - 12:30 p.m. - Plenary Session 3 (60 minutes) - Group Live - Ethics

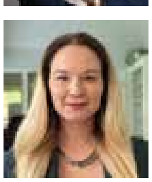
Bending the Arc of History Toward Justice - *Terrence Franklin had been a trust and estate litigator, handling disputes including will contests for a quarter century, when he discovered a will contest from the 1840s that challenged the will done by his white fourth great-grandfather that emancipated Terrence's fourth great-grandmother and her children and grandchildren from slavery. This discovery led Terrence to share the story of his ancestors and other stories like them. In this presentation, Terrence recounts the riveting story of his ancestor Lucy Sutton and the fight in the courts to uphold the last will and testament, and he also profiles several other black women, contemporaries of Lucy, who just may have helped Lucy and her family make it to freedom.*

- **Terrence Franklin, Partner, Sacks, Glazier, Franklin & Lodise LLP**

12:30 p.m. - 1:30 p.m. - Lunch

1:30 - 3:00 p.m. - Plenary Session 4 (90 minutes) - Group Live 2 CTFA



Counseling the Millennial Millionaire - *A discussion focusing on the many challenging estate planning and trust administration issues unique to young, wealthy clients.*

- **Alexander Lyden-Horn, Managing Director, Director of Delaware Trust Services and Trust Counsel, Evercore Trust Company, N.A.**
- **Matthew D'Emilio, Managing Member, McCollom D'Emilio Smith Uebler LLC**
- **Beth Knight, Director, Richards, Layton & Finger**
- **Erin Markham, Vice President, Senior Trust Officer, The Goldman Sachs Trust Company**

3:00 - 3:15 p.m. - Break - Governor's Hall with Exhibitors

3:15 - 4:15 p.m. - Plenary Session 5 (60 minutes) - Group Live 1.25 CTFA




The Modern Directed Trusts: Wait, You Are Directing Me to Do *What?* - *Taking direction from third party advisors without fiduciary experience/knowledge can provide some added risk depending on what the trustee is directed to do. This session will address issues such as non-traditional investments, distribution to individuals who are not beneficiaries, distributions directly out of an LLC, as well as issues with the attainment of information needed to perform its duties as directed trustee such as valuations for closely held entities, tax information, and foreign asset information.*

- Isabel Rute Araújo, SVP/Chief Administrative Officer, Key National Trust Company of Delaware
- Robert W. Eaddy, President, The Bryn Mawr Trust Company of Delaware
- Cynthia D.M. Brown, President, Commonwealth Trust Company
- Thomas M. Forrest, President & CEO, U.S. Trust Company of Delaware

4:15 - 4:30 p.m. - Break - Governor's Hall with Exhibitors

4:30 - 6:00 p.m. - Plenary Session 6 (90 minutes) - Group Live 2 CTFA,

Planning With Purpose in Mind - *Trusts' material purposes have traditionally been expressed implicitly. Longer-lived trust documents such as dynasty trusts, and the dispersion of fiduciary responsibility among advisors and trustees, heighten the need to express material purposes explicitly. We will review the history of the material purpose/Claflin doctrine, and consider ways to express purpose in several areas: discretionary distribution standards, unique assets and concentrated holdings, and statements of intent.*

- R. Hugh Magill, Vice Chairman, Retired, The Northern Trust Company

6:00 - 7:00 p.m. - Reception - Governor's Hall with Exhibitors

Day 2 - Wednesday - October 19th

7:15 - 8:00 a.m. - Registration

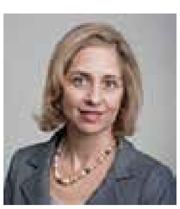
8:00 - 9:30 a.m. - Plenary Session 1 (90 minutes) - Group Live 2 CTFA

Review of the Past Year's Significant, Curious, or Downright Fascinating Fiduciary Cases *- This session will review selected reported fiduciary litigation decisions from 2021 that relate to multiple areas of estate planning, estate and trust administration, the fiduciary duties of agents, administrators, trustees, and other fiduciaries, and related trial practice, and identify and discuss navigating contemporary fiduciary challenges.*

- Dana G. Fitzsimons, Jr., Principal, Senior Fiduciary Counsel, Bessemer Trust

9:30 - 9:45 a.m. - Break - Governor's Hall with Exhibitors

9:45 a.m. - 10:45 p.m. - Plenary Session 2 (60 minutes) - Group Live 1.25 CTFA, CCTS




Delaware Developments: Improved Statutes! New Cases! – *Our panel will serve as your guides to scale the heights of improved Delaware statutes – and plumb the depths of the always-intriguing backstories giving rise to new case law addressing Delaware trusts.*

- Jocelyn Margolin Borowsky, Partner, Duane Morris LLP
- Gregory J. Weinig, Partner, Connolly Gallagher LLP

10:45 - 11:00 a.m. - Break - Governor's Hall with Exhibitors

11:00 - 12:00 p.m. - Plenary Session 3 (60 minutes) - Group Live 1.25 CTFA



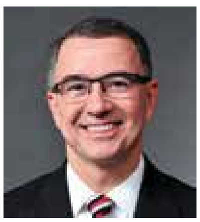
Use of Delaware trusts in International/Cross Border Planning - ***Delaware trusts help solve some of the most complex international tax and non-tax planning challenges. This panel will explore applications of Delaware trust law to facilitate cross-border wealth transfers, inbound U.S. investments, pre-immigration planning and other problems confronting multi-national families.***

- Scott A. Bowman, Partner, McDermott Will & Emery LLP
- Myriam Soto, Head of International Wealth Planning and Fiduciary Services, BNY Mellon Wealth Management
- Daniel Hayward, Partner, Gordon, Fournaris & Mammarella, P.A.

12:00 - 12:15 p.m. - Break - Governor's Hall with Exhibitors

12:15 - 1:00 p.m. - Lunch - Governor's Hall with Exhibitors

1:00 - 2:00 p.m. - Plenary Session 4 (60 minutes) - Group Live – Ethics 1.25 CTFA



Avoiding a Wealth of Trouble - ***Claims against trust and estate lawyers are on the rise. This program will address the top claims and ethics issues facing trust and estates lawyers, including conflicts, joint representations (including family representations), confidentiality, and managing the representation with good engagement and closing letters.***

- Randy Curato, Vice President, Senior Loss Prevention Counsel, ALAS, Inc.

2:00 - 2:15 p.m. - Break - Governor's Hall with Exhibitors

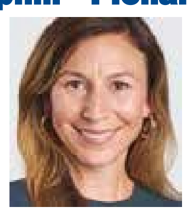
2:15 - 3:15 p.m. - Plenary Session 5 (60 minutes) - Group Live 1.25 CTFA, CCTS

Competing with Copy Cats - Why the First State is Still #1 for Personal Trusts - ***With favorable trust laws now in many states, why Delaware remains the leader. This session counters misleading state rankings to show why experience, innovation, and infrastructure put Delaware first.***

- Jeffrey C. Wolken, Senior Vice President, Wilmington Trust, N.A.

3:15 - 3:30 p.m. - Break - Governor's Hall with Exhibitors

3:30 - 4:30 p.m. - Plenary Session 6 (60 minutes) - Group Live 1.25 CTFA

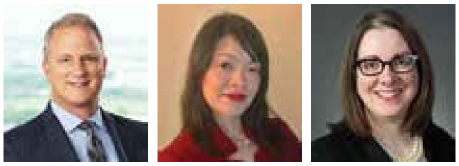



Purpose Trusts - ***Description TBA.***

- Vincent Thomas, Partner, Young Conaway Stargatt & Taylor LLP
- Beth King, President,
  Brown Brothers Harriman Trust Company of Delaware, N.A.

4:30 - 4:45 p.m. - Break - Governor's Hall with Exhibitors

4:45 - 5:45 p.m. - Plenary Session 7 - (60 minutes) - Group Live 1.25 CTFA, CCTS



Trusts in Motion - ***This panel will discuss issues around determining trust governing law for validity, construction and administration, including situs, choice of law and conflicts of law issues. This will include an update on the Uniform Law Commission drafting committee on conflicts of law in trusts and estates acts.***

- **Todd Flubacher, Partner, Morris Nichols Arsht & Tunnell LLP**
- **Elizabeth Luk, Head of Delaware Trust, BNY Mellon**
- **Susan D. Snyder, Trust Counsel and Deputy General Counsel, Northern Trust**

American Bankers Association (ABA) Professional Certifications has approved **2022 Delaware Trust Conference** for:

18 CTFA, 2.5 CRCM, 2.5 CCTS, 2 CRSP, 1.25 CSOP credits.
APPROVED NON-ABA CE search for training will appear as:
Delaware Bankers Association | 2022 Delaware Trust Conference

*Approved program may take up to 7 days after approval to appear in CE Search

Attendee Instructions to self report for CE Credit

1. Log into certification record at **aba.csod.com**

2. Hover over **ADD CE CREDIT** select **APPROVED NON-ABA CE**

3. Enter key word(s) from program title or sponsor name and **Select** program from search results

4. Click **Request** and when page refreshes click **Mark Complete**