The Delaware Bankers Association and The Delaware Financial Education Alliance
Present the 17th Annual Delaware Trust Conference

2022 Delaware Trust Conference

October 18 & 19

Chase Center on the Riverfront, Wilmington

Located at 815 Justison Street, Wilmington, DE 19801

2022 DELAWARE TRUST CONFERENCE
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Sarah A. Long
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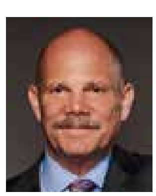
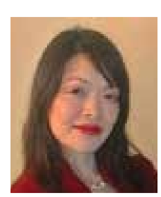


Dave Diamond
President
The Northern Trust Co. of Delaware
Chair
DBA Trust Committee



Elizabeth M. Luk
Director, Head of Delaware Trust
BNY Mellon Wealth Management
Co-Chair
DBA Trust Committee

Day 1 - Tuesday - October 18th

Note: All Sessions Are Available for Live Streaming.
On-Demand Sessions will be available through November 30, 2022 for Full Credits!

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

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

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

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

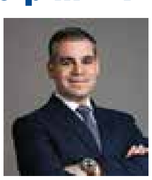
11:30 a.m. - 12:30 p.m. - Plenary Session 3 (60 minutes) - Group Live - Ethics

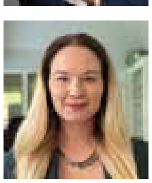
Bending the Arc of History Toward Justice - *Terrence Franklin had been a trust and estate litigator, handling disputes including will contests for a quarter century, when he discovered a will contest from the 1840s that challenged the will done by his white fourth great-grandfather that emancipated 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 - Riverfront Ballroom

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

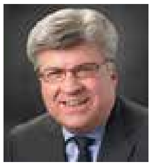


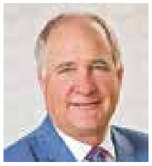
Counseling the Millennial Millionaire - *A discussion focusing on the many challenging estate planning and trust administration issues unique to young, wealthy clients.*

- 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



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 R. Araújo, Sr. Manager, Trust Consulting Services, Charles Schwab 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

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 a.m. - 9:00 a.m. - Plenary Session 1 (60 minutes) - Group Live

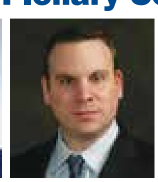

Delaware Developments: Improved Statutes! New Cases! – ***Our panel will serve as your guides to scale the heights of improved Delaware statutes – and plumb the depths of the always-intriguing backstories giving rise to new case law addressing Delaware trusts.***

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

9:00 - 9:15 a.m. - Break - Governor's Hall with Exhibitors

9:15 - 10:15 a.m. - Plenary Session 2 (60 minutes) - Group Live





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.

10:15 - 10:30 a.m. - Break - Governor's Hall with Exhibitors

10:30 - 11:30 a.m. - Plenary Session 3 (60 minutes) - Group Live - Ethics

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.*

- **Rawn Reinhard, Senior Loss Prevention Counsel, ALAS, Inc.**

11:30 - 11:45 a.m. - Break - Governor's Hall with Exhibitors

11:45 a.m. - 12:30 p.m. - Lunch - Riverfront Ballroom

12:30 - 2:00 p.m. - Plenary Session 4 (90 minutes) - Group Live

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**

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

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

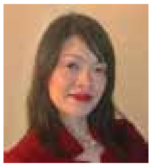
3:30 - 4:30 p.m. - Plenary Session 6 (60 minutes) - Group Live

Social Media and Freedom of Expression: How Delaware's Special Purpose Trust Statute is Helping to Revolutionize Content Governance - *In 2019, Facebook established a Delaware special purpose trust called the Oversight Board Trust to give users of their platforms an opportunity to appeal the company's decisions to remove content or keep content online. This session will include a discussion of the Oversight Board Trust, including 1) the purpose of the trust; 2) the structure of the trust; 2) the roles and responsibilities of the Individual Trustees and Managers, Corporate Trustee and Managers, and the Director of Administration; 4) various aspects of Delaware law that the trust relies on to help accomplish the overall purpose; and 5) the independent relationship between the Oversight Board and Meta, including the appeals process.*

- **Vincent Thomas, Partner, Young Conaway Stargatt & Taylor LLP**
- **Beth King, President, Brown Brothers Harriman Trust Company of Delaware, N.A.**
- **Olivia Jackson, General Counsel, Meta Oversight Board**

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

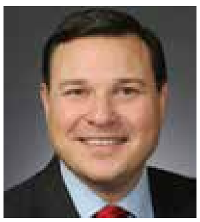




Trusts in Motion - *This panel will discuss issues around determining trust governing law for validity, construction and administration, including situs, choice of law and conflicts of law issues. This will include an update on the Uniform Law Commission drafting committee on conflicts of law in trusts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

On Demand Sessions

On Demand Session 1 - Corporate Transparency Act - *2021 was filled with a significant amount of legislative activity that impacted the wealth planning and tax practice. The Corporate Transparency Act represents the most significant reformation of the Bank Secrecy Act and related anti-money laundering rules since the US PATRIOT Act. All wealth planning and tax practitioners will need to understand the compliance obligations under the CTA, which is mainly focused on requiring corporations, limited liability companies, partnerships, and indirectly trusts, to disclose information on their beneficial owners. The reporting requirements cast a broad net, can be onerous, and are riddled with exceptions. This panel will cover the history behind the enactment of the CTA, key provisions under the CTA and recently issued proposed regulations, and practical considerations on how practitioners can comply with the guidance available to date.*



- Glenn G. Fox, Partner, Tax/Wealth Management, Baker & McKenzie LLP

On Demand Session 2 - Case Studies: Discretionary Distributions - *Making discretionary distributions is a fundamental responsibility of a trustee. Multiple case studies will illustrate how trustees balance between competing interests when exercising discretion.*


- Cody Snyder, Vice President, Senior Fiduciary Officer, The Bryn Mawr Trust Company of Delaware
- Timothy S. Egan, Managing Director, Wealth Advisory, The Glenmede Trust Company, N.A.

On Demand Session 3 - Onboarding Trust Case Studies: Tips for Resolving Natural Tension Between Business Development and Trust Administration - *This Case Study will address the age-old dispute between Business Development and Trust Administration/Group Management. Topics will include: Acceptance of Non-Traditional Assets, High-Risk Clients, Non-US Clients, Time-Sensitive Matters and More!*


- Todd Hammond, CTFA, TEP, Vice President, National Trust Business Development Officer, Bryn Mawr Trust Co. of DE, Bryn Mawr Trust
- Wendy Zimmer Cox, J.D., CTFA, Senior Vice-President Fiduciary Officer, Director of Personal Trust, Greenleaf Trust

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Exhibitors

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The Bryn Mawr Trust Company of Delaware serves as a Delaware corporate fiduciary and administrative trustee under the full spectrum of tax advantaged Delaware solutions contemplated by attorneys and advisers throughout the United States. We support all of Delaware's laws and statutes addressing personal trusts and estate planning; business and institutional trusts, holding companies; captive domicile entities; and alternative business entities.

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Glenmede was created as an independent trust company over 60 years ago to serve as investment manager and trustee of the Pew family's charitable interests. Today, we manage over $40 billion for high-net-worth individuals and families, endowments, foundations, and institutional clients.

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GF&M GORDON, FOURNARIS & MAMMARELLA, P.A.

Gordon, Fournaris & Mammarella, P.A. is a law firm located in Wilmington, Delaware focusing on Trusts and Estate Planning, Fiduciary Litigation, Business Planning and Transactions, Commercial Real Estate, Land Use, Zoning, Corporate and Commercial Litigation and Taxation.

If you require legal advice or legal representation, please contact us.

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Peter S. Gordon, Esquire
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McCollom D'Emilio Smith Uebler LLC is a Delaware law firm focusing on trusts, estates, and tax; business transactions, and litigation. We represent corporate and individual clients in a range of transactional and litigation matters with a commitment to strategic thinking, responsiveness, and efficiency.

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Richards, Layton & Finger, Delaware's largest law firm, provides clients with nuanced advice and innovative approaches to Delaware common law and statutory trusts. Our lawyers represent some of the world's most prominent financial institutions, high-net-worth individuals, and private foundations in estate planning and trust and fiduciary matters, providing customized solutions for their business or wealth management strategies. Backed by our practical experience and our participation in the evolution of Delaware trust law, we stand ready to create solutions to challenging problems as they arise, with the goal of enabling our clients to fully benefit from Delaware's sophisticated trust laws. Our award-winning lawyers have built a proven record of success by delivering exceptional legal advice to our clients.

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YOUNG CONAWAY

Young Conaway Stargatt & Taylor, LLP provides counseling to high net-worth individuals concerning their estate planning and assists with a myriad of sophisticated wealth planning transactions. The firm also advises individual and corporate fiduciaries concerning the proper administration of estates and trusts, and counsels them concerning the relocation of trusts to Delaware, mergers, decantings, and other modifications. Our firm's attorneys file estates and trust actions in the Delaware Court of Chancery, including, trust consent petitions, petitions for instructions, will contests, and other complex litigation matters, involving estates and trusts.

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BMO Wealth Management

BMO Delaware Trust Company

BMO Delaware Trust Company is a wholly-owned subsidiary of BMO Financial Group ("BMO") and part of BMO Wealth Management, which includes a broad offering of wealth management products and services with an active presence in markets across Canada, the United States, Europe and Asia.

As part of this offering, BMO Delaware provides customized Delaware Trustee services for individuals choosing to integrate Delaware planning solutions into their overall wealth plan. Our expertise in Delaware affords us a deep knowledge of the nuances and complexities of Delaware trust law. BMO's combined capabilities and expertise enables us to help manage the increasing complexity that comes as our clients plan, grow, protect, and transition their wealth.

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Anne Booth Brockett
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Charles Schwab Trust Company of Delaware (CSTCD) provides administrative trustee services exclusively for Registered Investment Advisors, private family offices, and their clients. Acting solely as a directed trustee under Delaware law, CSTCD's structure allows independent advisors to develop and maintain long-term investment relationships for trust assets while leveraging industry-leading securities custody, technology, and administrative expertise for the families they serve.

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Website: Personal Trust Services | Charles Schwab

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Morris Nichols is nationally known for the strength of its Trusts & Estates/Private Client practice. We have a market leading practice advising banks and trust companies in the highly specialized area of Delaware trust law. Chambers High Net Worth (HNW) has ranked our practice in Band 1 among Delaware private wealth law firms, with sources touting the group's reputation as "one of the leading firms in Delaware," and the "first point of reference" on Delaware trust law.

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Chilton Trust, a private, independent Trust Company, provides wealth management services including fiduciary services and investment solutions to high net worth individuals, families, and foundations. Chilton Trust operates under a national charter, and in addition to its principal office in Palm Beach, FL, includes Chilton Trust Company of Delaware, based in Wilmington, and trust representative offices in Charlotte, NC, Naples, FL, New York, NY and Stamford, CT.

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Commonwealth

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First State Trust Company (FSTC), with locations in Wilmington, Delaware and West Palm Beach, Florida, has been providing trust, custody, reporting and administrative services for more than 40 years.

Our core business model is building strategic partnerships with Financial Advisors across the country, where we provide five-star service supported by industry leading software – so that the advisor can concentrate on providing investment advice. Our solution is a partnership between the client, the client's financial advisors, and our trust administration services team. It's that simple.

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Greenleaf Trust is a comprehensive wealth management firm with specialized disciplines in goals-based wealth management, trust administration and retirement plan services. As a privately held and managed trust-only bank, our independence frees us from conflicts of interest and ensures that our clients' best interests are at the center of everything we do. Client-aligned and talent-driven, we adhere to the highest standards of fiduciary excellence. Client relationships begin at $2 million.

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NEW YORK PRIVATE TRUST
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New York Private Trust Company (NYPTC) is an advisor-friendly trust company in Wilmington, DE. NYPTC provides a broad range of fiduciary services to individuals and other institutions lacking trust powers throughout the U.S. and abroad. Its Delaware situs allows individuals to create trusts having perpetual duration, asset protection, investment management flexibility and favorable tax treatment. With a wealth of experience dealing with cross-border planning we also work with non-U.S. clients.

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Pinion Individual Trustee Services provides an alternative to family member or corporate trustees, bringing a unique combination of expertise, dedication, empathy and openness to serve clients in ways that best fit their specific needs. As an individual trustee, Pinion has the flexibility to accept assets that more traditional trust providers may not be able to accept. Pinion is proudly affliated with Santora CPA Group.

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PNC Delaware Trust Company

PNC Delaware Trust Company has long served the needs of high-net-worth individuals and families with a wide range of Delaware trust solutions. We provide customized fiduciary and custody services for trusts administered under particular provisions of Delaware law.

The PNC Delaware Trust Company team provides the experience and resources to deliver solutions that enable individuals and their advisors to navigate the complexity of personal trusts–and to help ensure an exceptional client experience.

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For almost 40 years, Santora CPA Group has been providing clients with interdependent and outside-the-box thinking while offering quality tax, accounting, and auditing services. In addition to those traditional services, we also offer fiduciary, trust, wealth enhancement, estate planning, profit improvement, HR consulting, payroll, bookkeeping, business valuation, and litigation support. When working with us, you will always have a highly skilled, well-trained professional who is "Right, By Your Side."

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Truist Delaware Trust Company, a wholly owned subsidiary of Truist Financial Corporation, is a corporate fiduciary serving the needs of families seeking Delaware trust solutions by offering a full range of trust strategies to provide flexibility and innovative trust design for our clients. We welcome the opportunity to meet with clients and their advisors to explore Delaware trust solutions that can be tailored to their needs.

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To learn more about Bank of America Private Bank, please visit bankofamerica.com/PrivateBank

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Since 1923, BLS has provided services to a diverse client base while never losing sight of our founding commitment of building long-standing, mutually beneficial relationships. BLS supports individuals, estates, and trusts with key services that help clients successfully manage their current estates and facilitate the transfer of wealth.

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- Tax and estate planning for fine arts and collections

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CIBC Delaware Trust Company recognizes the value that an experienced and knowledgeable trustee – serving with fiduciary care and responsibility – brings to the goals of wealth planning. We provide an expansive offering of tailored solutions including integrated wealth strategies, customized investment management, and both fully managed and directed trustee services.

For more information, please contact:
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Duane Morris LLP, a law firm with more than 800 attorneys in offices across the United States and internationally, is asked by a broad array of clients to provide innovative solutions to today's legal and business challenges. Evolving from a partnership of prominent lawyers in Philadelphia a century ago, Duane Morris' modern organization stretches from the U.S. to Europe and the Middle East, and now across Asia. Throughout this global expansion, Duane Morris has remained committed to preserving its collegial, collaborative culture that has attracted many talented attorneys. The firm's leadership, and outside observers like the Harvard Business School, believe this culture is truly unique among large law firms, and helps account for the firm continuing to prosper throughout changing economic and industry conditions.

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At K&L Gates, our fully integrated global platform enables us to provide exceptional client solutions. The Wilmington office transactional team focuses on financial institutions and Delaware business entities and their involvement in a wide range of domestic and cross-border transactions. Our lawyers play a leading role in Delaware law matters, including through service on the small and prestigious committees responsible for some of Delaware's most important legislation.

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JTC is a publicly listed, global professional services business with deep expertise in trust/private client, corporate and fund services.

We have been helping private clients from all over the world for over 35 years, and we have developed particular expertise in working with clients from Latin America, the US, Europe, the Middle East and Asia. Within the US we have offices in Austin, Boston, Miami, New York, San Jose and South Dakota. From 1 November 2022 we will also have an office in Delaware through the acquisition of a trust company.

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Peak Trust Company serves estate planners looking for a professional trustee, who want accessible expertise. We offer the experience and sophistication to help you establish trusts, backed by easy-to-use trust administration. Unlike traditional banks and trust companies, at Peak Trust Company, your trust is our core business. This enables us to provide a customized delivery process tailored to your specific needs, providing everything you need but only what you want.

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Pinion Individual Trustee Services provides an alternative to family member or corporate trustees, bringing a unique combination of expertise, dedication, empathy and openness to serve clients in ways that best fit their specific needs. As an individual trustee, Pinion has the flexibility to accept assets that more traditional trust providers may not be able to accept. Pinion is proudly affliated with Santora CPA Group.

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R&T and TBS successfully completed their planned business combination in 2022. The combined firm will provide banks, credit unions, wealth managers and trust institutions with a larger selection of products and services, designed to meet their unique cash sweep, deposit funding and securities-based lending needs. R&T has been providing deposit and liquidity services since 1974. TBS has been providing financial technology services since 2004.

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2022 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.

AT COMPLETION OF THIS CONFERENCE, YOU WILL BE ABLE TO: Define the steps an international client uses when considering establishment of a Delaware trust and apply the same to the development of their business; Apply best practices methods on satisfying client needs and trust administration; Identify and apply current trends in Delaware trust planning to better serve existing clients and broaden your trust knowledge, including consideration of both state and national trends; Identify and avoid potential risks to trust clients and trust companies with regard to potential litigation, particularly in the fields of document drafting and review, fiduciary oversight, trust transfer and ethics; analyze and identify potential issues with special assets, asset protection trusts, and international filing requirements for trusts.

PROGRAM CONTENT: Delaware trusts are solid, dependable, and best of all thanks to Delaware's rule of perpetuity, they're built to last! The seventeenth annual Delaware Trust Conference will highlight all the unique advantages of the First State's trust environment. Attendees will enjoy a stellar line-up of the nation's top trust, legal and wealth management experts, all of whom will provide them with the latest information on using Delaware trusts to the maximum benefits for themselves and their clients.

PROGRAM LEVEL: Intermediate

PROGRAM PREREQUISITES & ADVANCE PREPARATION: Those attending the conference will be from varied backgrounds; however all should have a minimum of a bachelor's degree from an accredited college or university. In addition, the attendees will also have a variety of higher educational degrees and designations including, but not limited to J.D., CPA, CTFA, and CFP.

DELIVERY METHOD: Group Live discussions with PowerPoint supplements. All materials presented are provided to attendees in digital electronic format.

REGISTRATION INSTRUCTIONS: Both days for $1,195 for DBA/FEA members; $1,695 for non-members. Daily prices are also available and are listed on the enclosed application. To register, please complete the registration form on-line: **https://portal.debankers.com/events/**

Questions? Call 302-678-8600 or email Renee Rau: renee.rau@debankers.com

REFUND POLICY: If an attendee drops a seminar after the registration deadline, but at least ten (10) business days before the conference starts, the drop fee is $100.00. After October 7, 2022, the attendee will be charged the full cost of the conference. If the attendee does not drop the conference and does not attend, s/he will be considered a “no-show” and will be charged the full cost. Qualified substitutions are permitted at any time. Continuing education credits will be given to the individual who attends the conference.

PROGRAM CANCELLATION POLICY: The DBA/FEA reserves the right to cancel a session for insufficient enrollment. If a class is cancelled, the DBA/FEA will notify the registrants at least five (5) business days before the scheduled date and refund the course fee.

COMPLAINT RESOLUTION POLICY: Every program’s relevance is guaranteed. If an attendee becomes dissatisfied with the program, she/he will receive a full refund of the enrollment fee or be permitted to attend an equivalent program at no charge. For more information regarding administrative polices such as complaints and refunds, please contact our offices at 302-674-0202.

The Delaware Bankers Association Financial Education Alliance is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority of acceptance of individual courses for CPE credits. Complaints regarding registered sponsors may be addressed to National Registry of CPE Sponsors, 150 Fourth Avenue North 700, Nashville, TN 37219-2417, website www.learningmarket.org.

Total Credits for
2022 Delaware Trust Conference = 18.0 CLE applied for (DE & PA) (including 2.0 Ethics Credits), CPE & ICB Credits Applied for.
Participants can earn up to 18.0 CPE credits in Specialized Knowledge and Applications field of study.