

# AGENDA

**The Delaware Bankers Association &  
The Delaware Financial Education Alliance present**



# **2025 Delaware Trust Conference**

**October 28 & 29**

**Chase Center on the Riverfront & Live Stream**



# 2025 Delaware Trust Conference

## October 28 & 29

Chase Center on the Riverfront & Live Stream

Dear Wealth Management Professional,

The Delaware Trust Conference is celebrating its twentieth year as one of the nation's premiere wealth management events. The conference is renowned for presenting the top names in trust management to enlighten attendees on the unique advantages of Delaware trusts, and how to best implement those products.

The Delaware Trust Conference offers an excellent opportunity to network while obtaining continuing education credits. The sessions are tailored to provide the maximum benefit for Trust Professionals, Portfolio Managers, Financial Advisors, Attorneys, CPAs, CTFAs, Wealth & Asset Management Services Executives, Executive Trust Officers, Investment Officers, Investment Managers, and Trust Department Managers.

The Delaware Trust Conference provides a flexible conference experience. In addition to in-person attendance at the spacious Chase Center on the Riverfront, we offer the convenience of remote viewing via a broadcast-quality live stream. There will also be four on-demand sessions. And all sessions will be available for credit, on-demand through November 30th.

Sponsorship and exhibitor opportunities are also available. We encourage you to join the growing list of prestigious firms sponsoring and exhibiting at the conference. For complete information on sponsorship and exhibitor opportunities, please visit [www.debankers.com](http://www.debankers.com), or email Corinne Stayton at: [corinne.stayton@debankers.com](mailto:corinne.stayton@debankers.com).

We look forward to seeing you at the 2025 Delaware Trust Conference!



**Karyn S.W. Polak**

President  
Delaware Bankers Association  
Delaware Financial Education Alliance



**Robert W. Eaddy**

President  
The Bryn Mawr Trust Company of DE  
Chair  
DBA Trust Committee



**Mark V. Purpura**

Director  
Richards, Layton & Finger, P.A.  
Co-Chair  
DBA Trust Committee

## Day 1 – Tuesday – October 28<sup>th</sup>

Note: All Sessions Are Available for Live Streaming.

On-Demand Sessions will be available through November 30, 2025 for Full Credits!

### 7:45 – 8:30 a.m. – Registration

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

Planning Ideas Worth Stealing - In light of recent federal tax developments and expected reforms, some estate planning strategies are becoming especially popular. This presentation explains and evaluates several of these planning ideas, including spousal lifetime access trusts, charitable remainder trusts as beneficiaries of retirement accounts, ultra-long-term GRATs, and strategies to avoid the cap on the deduction for state and local taxes.



**Samuel A. Donaldson**

Professor of Law  
Georgia State University

### 10:00 – 10:15 a.m. – Welcome / Break – Governor’s Hall with Exhibitors

### 10:15 – 11:15 a.m. – Plenary Session 2 (60 minutes) – Group Live

Survive and Thrive with Trust Act 25 - This session will review recently enacted Delaware trust legislation and recently decided Delaware trust and estate cases, and will highlight any significant trends in the law.



**Jocelyn Borowsky**

Partner  
Duane Morris LLP



**Gregory J. Weinig**

Partner  
Connolly Gallagher LLP

### 11:15 – 11:30 – Break – Governor’s Hall with Exhibitors

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

Settlor’s Intent: The Cardinal Rule is No Red Herring - This session will discuss the role of settlor intent within general applications of trust law, including its importance when considering matters of trust construction, administration and modification.



**Todd A. Flubacher**

Partner  
Morris, Nichols, Arsht & Tunnell LLP



**Beth Gansen Knight**

Director  
Richards, Layton & Finger, P.A.



**Vincent C. Thomas**

Co-Chair, Business Planning and Tax Section, and Partner  
Young Conaway Stargatt & Taylor, LLP

### 12:30 p.m. – 1:30 p.m. – Lunch – Riverfront Ballroom

### **1:30 – 2:30 p.m. – Plenary Session 4 (60 minutes) – Group Live – Ethics**

**Emerging Ethical Issues and Hot Topics** – This program will cover a range of emerging ethical issues within the practice of law, focusing, where applicable, on the trust and estate context. Topics will include ethical considerations with respect to remote or hybrid work arrangements, navigating appropriate boundaries with respect to the increasing use of generative artificial intelligence within the law, and the ethical tensions resulting from evolving know-your-client regulatory requirements.



**Julian C. Zebot**

Partner  
Maslon LLP

### **2:30 – 2:45 p.m. – Break – Governor’s Hall with Exhibitors**

### **2:45 – 3:45 p.m. – Plenary Session 5 (60 minutes) – Group Live**

**Delaware Trust Planning for International Clients** – This panel will analyze the tax and fiduciary issues associated with trust planning for non-US grantors and beneficiaries, including how Delaware trusts can be utilized to address such issues. The panel will discuss planning techniques for international clients including the use of foreign grantor trusts, foreign non-grantor trusts, and domestic non-grantor trusts, as well as the unique due diligence and reporting requirements faced by Delaware fiduciaries when accepting and administering trusts with a cross-border component.



**Robert Coppock**

Vice President  
The Bryn Mawr Trust Co. of Delaware



**Daniel F. Hayward**

Member  
McCollom D’Emilio Smith Uebler LLC



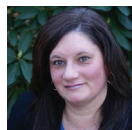
**Beth Tractenberg**

Partner  
Step toe LLP

### **3:45 – 4:00 p.m. – Break – Governor’s Hall with Exhibitors**

### **4:00 – 5:30 p.m. – Plenary Session 6 (90 minutes) – Group Live**

**Jurisdictional Alternatives** – A case study-based analysis of the differences between Delaware, Florida, Nevada and Tennessee trust law.



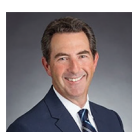
**Cindy Brown**

Director of Special Situs Trusts, Wealth Management  
Mechanics Bank



**Matthew D’Emilo**

Managing Member  
McCollom D’Emilio Smith Uebler LLC



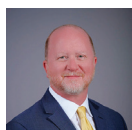
**Mark Parthemer**

Chief Wealth Strategist & FL Regional Director  
Glenmede



**Matthew Blattmachr**

President & CEO  
Peak Trust Company



**Eddy R. Smith**

Kennerly Montgomery & Finley P.C.

### **5:30 – 6:30 p.m. – Reception – Governor’s Hall with Exhibitors**

## Day 2 – Wednesday – October 29th

### 7:15 – 8:00 a.m. – Registration

### 8:00 a.m. – 9:30 a.m. – Plenary Session 1 (90 minutes) – Group Live

But I thought it was Irrevocable? Modifying and Modernizing Irrevocable Trusts - Existing irrevocable trusts often lack the needed flexibility to achieve certain goals. This session will explore why clients are interested in modifying trusts, the mechanics and techniques used to modify trusts as well as the tax and fiduciary concerns associated with modifying trusts.



**Michael M. Gordon**

Director  
Gordon, Fournaris & Mammarella, P.A.



**Elizabeth Luk**

Head of Delaware Trust  
BNY Wealth, BNY Mellon Trust of DE



**Michaelle D. Rafferty**

Shareholder Attorney  
Maupin, Cox & LeGoy

### 9:30 – 9:45 a.m. – Break – Governor’s Hall with Exhibitors

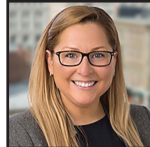
### 9:45 a.m. – 10:45 a.m. – Plenary Session 2 (60 minutes) – Group Live

2025 Federal Tax Law Highlights for Fiduciaries - This session provides a comprehensive overview of key 2025 federal tax law updates, with a focus on the practical implications for estate and trust administration and planning. Topics will include 2025 tax reform and key updates from the IRS and U.S. Treasury Department. Attendees will gain insight into how these developments may impact fiduciary income tax, estate, gift, and generation-skipping transfer taxes, fiduciary reporting obligations, and long-term planning strategies.



**AK Moody**

Senior Wealth Strategist, BNY  
Wealth



**Emily A. Plocki**

Tax and Wealth Planning Partner,  
Venable 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

Recent Delaware Trust Litigation Decisions and Trends – Making Them Work to Your Clients’ Advantage - This session will explore recent trust decisions from the Delaware courts, examine trends, and provide practical guidance to trustees and practitioners regarding their implications.



**Chad Shandler**

Director  
Richards, Layton & Finger, P.A.



**Scott Swenson**

Partner  
Connolly Gallagher LLP



**Andi Coloff**

Managing Director & Assistant General Counsel  
Bank of America

## 12:00 p.m. – 1:00 p.m. – Lunch – Riverfront Ballroom

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

Working With Beneficiaries With Mental Illness: A Structured and Collaborative Approach  
–1 in 5 people struggle with a mental health disorder in the United States and the odds are high that each trustee will have beneficiaries with mental health disorders. Understanding this special population and what to put in place will save trustees time, energy, and frustration, allow beneficiaries to avoid the trauma of being passed along from trustee to trustee, and create a reparative and healing experience of attachment for the beneficiary in their working relationship with the trustee.



**Amanda Koplin**

LPC, CEO

Koplin Consulting

## 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

Foreign Trusts – Inbound to the US and Outbound from the US – Marrying the Legal with the Practical Implication of Administration – This session will focus on what trust companies need to do when the planning is done, trusts need to be accepted and accounts opened. Both US inbound and US outbound cases will be discussed.



**Gregg Homan**

Head of Domestic Business Development  
JTC



**Jillian K. Williams**

SVP, Senior Fiduciary Officer,  
The Northern Trust Company of DE



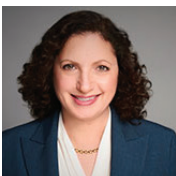
**Naro Zimmerman**

Deputy Head of Caribbean, Private Client Services  
JTC Group

## 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

Tax Controversy – A review of the administrative and judicial processes involved in disputed issues with the Internal Revenue Service.



**Michele F.L. Weiss**

Principal  
Holtz, Slavette & Drabkin, APLC



**Shannon L. Post**

Director  
Gordon, Fournaris & Mammarella, P.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

**Tackling Fraud in the Age of AI and Digital Payments** – As the fraud landscape continues to evolve, banks face a complex mix of persistent threats and rapidly changing risks. This session will explore the most pressing challenges in today's fraud landscape, examining both longstanding threats and emerging risks. Attendees will gain insights into traditional scams driven by social engineering, as well as the growing threat of artificial intelligence-enabled schemes such as deep fake fraud. The discussion will also highlight evolving fraud prevention strategies. Together, these topics offer a comprehensive view of the tactics reshaping the modern fraud environment and the tools needed to combat them.



**Patrick Smith**

SVP of Fraud Operations Management Optimization  
American Bankers Association

## On Demand Sessions

### On Demand Session 1

**Navigating Trust Disasters: Lessons learned from journeying 60+ years in the trustscape** – Too often trusts go off course, causing challenges for trustees – and for their grantors and beneficiaries. Caused by technical turbulence as well as by whirlpools of family dynamics, trust disasters capsize administration with expense, delays, and disharmony. In this online session, two seasoned trustees share insights gained from their encounters with trust disasters – including how they steered each trust through the storm. By attending this hour-long program, you will gain practical knowledge and strategies to better handle the trust challenges you may encounter.



**Wendy Cox**

Director of Personal Trust, CFO  
Greenleaf Trust Company



**Daniel P. Felix**

The Professional Trustee

### On Demand Session 2

**How (and Why) a Business Owner Might Use a Purpose Trust for Business Succession**

- If you have clients who are business owners, this presentation will help you address their questions about business succession and will give you another “tool in the tool kit” to discuss with those clients. The noncharitable perpetual purpose trust is a trust that has a stated purpose and is governed by a statute that recognizes the concept, such as Delaware’s purpose trust statute. The use of a purpose trust gives the business owner a way to provide for succession of the business while doing so in a way that can perpetuate values of the owner such as the business continuing to serve the local community, supporting employee welfare, or upholding certain business practices.



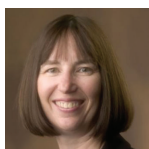
**David A. Diamond**

President  
The Northern Trust Company of DE



**Natalie Reitman-White**

Founder & Principal  
Purpose Owned LLC



**Susan Gary**

Professor  
University of Oregon

### On Demand Session 3

**Unique Assets Held in Trust: Proper Custody & Stewardship** – Art and Collectibles are increasingly being seen by clients as a considerable, if not critical segment of their financial portfolio and are often including these assets in more sophisticated financial planning efforts. As such, Trust officers are often finding themselves the stewards and custodians of objects of fine and decorative art which unfortunately don't come with instruction manuals for their proper care. This is particularly problematic with works of art where the value of the asset is so intrinsically tied to the work's condition, or collectibles where market fluctuations may instigate frequent value changes. This presentation will offer a primer on the different types of non-cash assets in the art and collectibles world which Trustees may encounter, basic principles for their proper care and management, and a discussion of the various types of experts and expertise within the "art world ecosystem" who fiduciaries should be partnering with to best maintain – and even grow – the value of these assets over time. escription to be announced.



**Courtney Booth Christensen**

Senior Director, Trusts & Estates  
Winston Art Group



**Elizabeth Pisano**

Director Mid-Atlantic Region,  
and American Art Specialist  
Winston Art Group

## 2025 Delaware Trust Conferece

### Cancellation Policy

Cancellations after October 1, 2025 will be charged a \$750 administrative fee, however substitutions are always allowed.

### Special Needs & Americans with Disabilities Notice

If you have special needs that may affect your participation in this event, please contact [Corinne.Stayton@debankers.com](mailto:Corinne.Stayton@debankers.com) to discuss accommodations.

### Financial Hardship Policy

Program registrants who are unable to afford continuing legal education program course registration fees due to financial hardship may petition for registration fee waivers or discounted program fees. A petition for a reduced fee shall be filed at the same time the attorney pre-registers for the program, and state why the normal fee associated with the program causes the lawyer's financial hardship. The petition must be signed by the lawyer. The conference registration coordinator may waive or reduce the fee for the CLE program at their discretion.