

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



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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, or email Corinne Stayton at: 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 28th

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
Steptoe 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.



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 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.