



2025 Delaware Trust Conference

General Certificate of Completion/Attendance and Maintenance System

Provider Name: Delaware Financial Education Alliance Provider Address: P.O. Box 494, Dover, DE 19903 (302) 678-8600
Course Title: 2025 Delaware Trust Conference

Professional Organization: _____

Attendee Name: _____ Professional ID Number: _____

I certify that I attended the sessions indicated below - _____

2025 Delaware Trust Conference Sessions

Hours Earned

☐ Tuesday, 10/28/25 8:30 a.m. - 10:00 a.m. - 90 minutes - 1.5 hours Speaker - Group Live: Planning Ideas Worth Stealing	
☐ Tuesday, 10/28/25 10:15 a.m. - 11:15 a.m. - 60 minutes - 1.0 hour Panel - Group Live: Survive and Thrive with Trust Act 25	
☐ Tuesday, 10/28/25 11:30 a.m. - 12:30 p.m. - 60 minutes - 1.0 hour Panel - Group Live: Settlor's Intent: The Cardinal Rule is No Red Herring	
☐ Tuesday, 10/28/25 1:30 p.m. - 2:30 p.m. - 60 minutes - 1.0 hour Speaker - Group Live: Trust Ethics - Emerging Ethical Issues and Hot Topics	
☐ Tuesday, 10/28/25 2:45 p.m. - 3:45 p.m. - 60 minutes - 1.0 hour Panel - Group Live: Delaware Trust Planning for International Clients	
☐ Tuesday, 10/28/25 4:00 p.m. - 5:30 p.m. - 90 minutes - 1.5 hours Panel - Group Live: Jurisdictional Alternatives	
☐ Wednesday, 10/29/25 8:00 a.m. - 9:30 a.m. - 90 minutes - 1.5 hours Panel - Group Live: But I thought it was Irrevocable? Modifying and Modernizing Irrevocable Trusts	
☐ Wednesday, 10/29/25 9:45 a.m. - 10:45 a.m. - 60 minutes - 1.0 hour Panel - Group Live: 2025 Federal Tax Law Highlights for Fiduciaries	
☐ Wednesday, 10/29/25 11:00 a.m. - 12:00 p.m. - 60 minutes - 1.0 hour Panel - Group Live: Recent Delaware Trust Litigation Decisions and Trends – Making Them Work to Your Clients' Advantage	
☐ Wednesday, 10/29/25 1:00 p.m. - 2:00 p.m. - 60 minutes - 1.0 hour Speaker - Group Live: Trust Ethics - Working With Beneficiaries With Mental Illness: A Structured and Collaborative Approach	
☐ Wednesday, 10/29/25 2:15 p.m. - 3:15 p.m. - 60 minutes - 1.0 hour Panel - Group Live: Foreign Trusts – Inbound to the US and Outbound from the US	
☐ Wednesday, 10/29/25 3:30 p.m. - 4:30 p.m. - 60 minutes - 1.0 hour Panel - Group Live: Tax Controversy	
☐ Wednesday, 10/29/25 4:45 p.m. - 5:45 p.m. - 60 minutes - 1.0 hour Speaker - Group Live: Tackling Fraud in the Age of AI and Digital Payments	
On Demand Sessions - Panels - 60 minutes - 1.0 hour each - ☐ Session 1 - Navigating Trust Disasters ☐ Session 2 - How (and Why) a Business Owner Might Use a Purpose Trust for Business Succession ☐ Session 3 - Unique Assets Held in Trust: Proper Custody & Stewardship	

Total Hours Earned

I certify that the attendee named above attended the activity sessions indicated and based upon actual records of attendance, should be credited with:

a total of _____ hours, including: _____ Enhanced Ethics credits.

Attendance has been verified at sessions

bearing official stamp and has been acknowledged by:

Renee Duncan - Delaware Bankers Association