Program Book

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

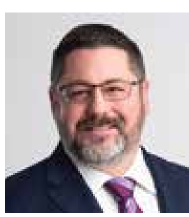
Welcome to the 2025 Delaware Trust Conference! This year, the Delaware Trust Conference celebrates its twentieth year as one of the premiere wealth management events in the country. Over the years, the Delaware Trust Conference has built a reputation for presenting the top names in trust management to highlight the unique advantages of Delaware trusts and how wealth practitioners can best implement those products for their clients. We're confident this year's line-up of presenters will further enhance that record!

As in the past, this year's conference provides a flexible conference experience. In addition to in-person attendance at the spacious Chase Center on the Riverfront, attendees will again have the option of remote viewing via a broadcast-quality live stream. Four on-demand sessions will also be available. All sessions will be available on-demand for up to 17.5 continuing education credits through November 30th.

The following pages detail the agenda, along with information on all our sponsors and exhibitors who make the Delaware Trust Conference possible. We hope you enjoy 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

Executive Committee
Chair: Robert W. Eaddy, President, The Bryn Mawr Trust Company of Delaware
Co-Chair, Mark V. Purpura, Director, Richards, Layton & Finger, P.A.

Cynthia D.M. Brown, Esq., Director of Special Situs Trusts, Wealth Management Mechanics Bank
Matthew P. D'Emilio, Esq., Director, McCollom D'Emilio Smith Uebler LLC
Elizabeth M. Luk, Head of Delaware Trust, BNY Wealth, BNY Mellon Trust of Delaware

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

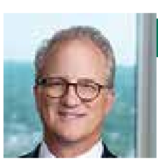
10:15 - 11:15 a.m. - Plenary Session 2 (60 minutes) - Group Live
Survive and Thrive with Trust Act 25 - This session will review recently enacted Delaware trust legislation and recently decided Delaware trust and estate cases, and will highlight any significant trends in the law.

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

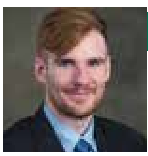
Emerging Ethical Issues and Hot Topics - This program will cover a range of emerging ethical issues within the practice of law, focusing, where applicable, on the trust and estate context. Topics will include ethical considerations with respect to remote or hybrid work arrangements, navigating appropriate 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

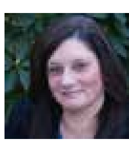
Daniel F. Hayward
Member
McCollom D'Emilio Smith Uebler LLC

Beth Tractenberg
Partner
Steptoe LLP

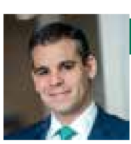
3:45 - 4:00 p.m. - Break - Governor's Hall with Exhibitors

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

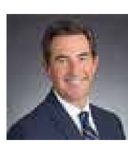
Jurisdictional Alternatives - A case study-based analysis of the differences between Delaware, Florida, Nevada and Tennessee trust law.



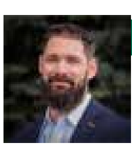
Cindy Brown
Director of Special Situs Trusts, Wealth Management
Mechanics Bank



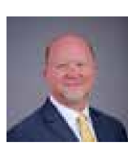
Matthew D'Emilo
Managing Member
McCollom D'Emilio Smith Uebler LLC



Mark Parthemer
Chief Wealth Strategist & FL Regional Director
Glenmede



Matthew Blattmachr
President & CEO
Peak Trust Company



Eddy R. Smith
Kennerly Montgomery & Finley P.C.

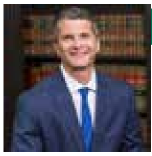
5:30 - 6:30 p.m. - Reception - Governor's Hall with Exhibitors

Day 2 - Wednesday - October 29th

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

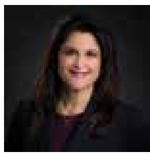
8:00 a.m. - 9:30 a.m. - Plenary Session 1 (90 minutes) - Group Live

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.

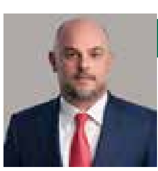
AK Moody
Senior Wealth Strategist
BNY Wealth

Emily A. Plocki
Tax and Wealth Planning Partner
Venable LLP

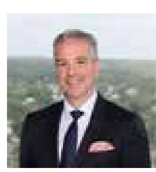
10:45 - 11:00 a.m. - Break - Governor's Hall with Exhibitors

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

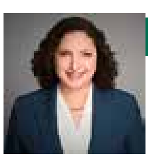
Jillian K. Williams
SVP, Senior Fiduciary Officer,
The Northern Trust Company of DE

Naro Zimmerman
Deputy Head of Caribbean, Private Client Services
JTC Group

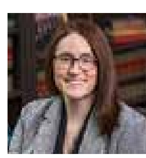
3:15 - 3:30 p.m. - Break - Governor's Hall with Exhibitors

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, Slavett & Drabkin, APLC

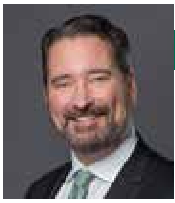


Shannon L. Post
Director
Gordon, Fournaris & Mammarella, P.A.

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.



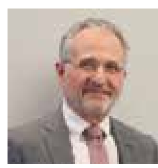
Patrick Smith
SVP of Fraud Operations Management Optimization
American Bankers Association

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.

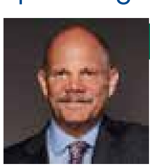
Wendy Cox
Director of Personal Trust, CFO
Greenleaf Trust Company



Daniel P. Felix
The Professional Trustee

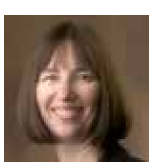
On Demand Session 2

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 Artory Group

Elizabeth Pisano
Director Mid-Atlantic Region,
and American Art Specialist
Winston Artory 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.

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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 advisors 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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BROWN BROTHERS HARRIMAN

About Brown Brothers Harriman

BBH is a privately held financial services firm founded in 1818 and headquartered in New York City. BBH is known for its exceptional client service, investment excellence, and tailored advice. For 200 years, its client-centric approach has fostered deep and lasting relationships built on commitment and trust. As a private partnership, free from the distractions of short-term or public market expectations, BBH is uniquely built to put clients first and create success that lasts.

BBH offers wealth management, corporate advisory and banking, investment management, and private equity to a roster of clients, including privately held companies, foundations and endowments and substantial families and individuals, and institutional investors. BBH has had one priority for 200 years: to be a partner in our clients' success.

For more information, please visit www.bbh.com.

Kerry Porter, Managing Director

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Citizens Trust Company of Delaware™

Citizens Trust Company of Delaware ("CTCD") provides sophisticated Delaware trust solutions for our clients backed by the breadth, depth, and protections of Citizens Financial Group. We specialize in serving the complex needs of individuals and families seeking access to Delaware's favorable trust laws with professional oversight and personalized guidance. Our experienced team provides comprehensive wealth management services, including trust administration, investment management, and philanthropic solutions. We serve as trustee on both fully managed and directed trusts, providing a customized trustee experience and boutique service approach.

Citizens Trust Company of Delaware
121 Continental Drive, Suite 110
Newark, DE 19713

[A Delaware Trust May Be Right for You | Citizens Trust Company of Delaware]

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Business Development Director and Senior Private Wealth Advisor
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CONNOLLY GALLAGHER

Connolly Gallagher works with its clients to achieve the best legal, strategic, compliance and tax results, in trusts, business ventures and real estate; advises lay and professional fiduciaries in the administration of trusts and estates; and litigates vigorously when necessary to defend its 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. Our lawyers advise individuals, families, businesses, and nonprofits on high value trust and estate planning matters; business formation, operations, and transactions; commercial real estate; and complex commercial, corporate, and fiduciary litigation. We collaborate closely with our clients and their advisors to shape and execute legal strategy efficiently.

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

Michael M. Gordon, Esquire

Peter S. Gordon, Esquire

Robert V.A. Harra III, Esquire

Joseph Bosik IV, Esquire

Patrick J. Rohrbach, Esquire

Mark P. Gordon, Esquire

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MCCOLLOM D'EMILIO SMITH UEBLER LLC
ATTORNEYS AT LAW

McCollom D'Emilio Smith Uebler LLC is a Delaware law firm focusing on trusts and estates, corporate and fiduciary litigation, and business transactions. 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

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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302-651-7588

Beth Gansen Knight
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Richards, Layton & Finger, P.A.
920 N. King Street, Wilmington, DE 19801

rlf.com

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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.

Vincent C. Thomas
Partner
P 302.576.3278
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Richard W. Nenno
Senior Counsel
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Rodney Square
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Wilmington, DE 19801

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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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BROCKSTEDT MANDALAS FEDERICO

Personal service and attention to individual, business, and family circumstances are hallmarks of Brockstedt Mandalas Federico LLC's estates & trusts practice. We serve a broad spectrum of clients from individuals and families to closely-held business owners and clients with special needs. Our trusts and estates practice includes all aspects of estate planning, estate administration, business succession planning, fiduciary advice, and fiduciary litigation. Our firm's clients receive comprehensive and highly individualized attention to their estate-planning needs.

We work closely with investment advisors, accountants, insurance professionals, and bank representatives to develop coordinated and comprehensive estate plans. After determining our client's needs we craft an estate plan using the appropriate tools including wills, trusts, powers-of-attorney, succession plans, and advanced health-care directives. Our goal with each estate plan is to ensure that our client's wishes are carried out in an orderly and tax-efficient manner.

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charles SCHWAB

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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GLENMEDE

THE GLENMEDE TRUST COMPANY OF DELAWARE

The Glenmede Trust Company of Delaware (GTCDE) is a privately owned and independent trust company that provides specialized fiduciary, investment, wealth planning and family office services for clients seeking access to Delaware's flexible trust laws and highly respected Court of Chancery. GTCDE serves as a trusted adviser to individuals and families as well as charitable entities that seek a trust company operating solely in Delaware to meet a variety of charitable, tax and estate planning goals. Working collaboratively yet distinctly from its affiliate, The Glenmede Trust Company, N.A. (GTCNA), our integrated wealth team helps our client base bring their purpose and vision to life.

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Morris Nichols
ARSHT & TUNNELL

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 law firms for private wealth law and private wealth disputes, 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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NORTHERN
TRUST

For more than 130 years, Northern Trust has provided the highest level of wealth management services to clients through 56 locations nationally and around the world. In fact, we've been named Best Private Bank by the Financial Times Group eleven times in the last thirteen years.

The Northern Trust Company of Delaware, a subsidiary of Northern Trust Corporation, has established a team of experts in Wilmington with the goal of leveraging one of the most tax-advantaged jurisdictions in the United States for the benefit of our clients. We specialize in delivering insightful perspectives and creative thinking to grow, manage and preserve multi-generational wealth for individuals and their families.

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PNC PRIVATE BANK

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 provisions of Delaware law. Our 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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Wilmington Trust

Wilmington Trust is a premier provider of wealth and institutional services for M&T Bank, one of the most financially sound and successful companies in the U.S. financial services industry. Founded by a family business leader more than a century ago, our guidance has helped generations of families and businesses thrive through times of growth and succession, backed by the sound experience of our professionals and a forward-looking mindset.

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BNY | WEALTH

For more than two centuries, BNY Wealth has provided services to financially successful individuals and families, their family offices and business enterprises, planned giving programs, and endowments and foundations. It has $339 billion in total client assets, as of June 30, 2025, and an extensive network of offices in the U.S. and internationally. We deliver leading wealth advice across investments, banking, custody, and wealth and estate planning. With a dedicated team of wealth managers and fiduciary specialists in Greenville, BNY Mellon Trust of Delaware provides full corporate trustee and trust administration services that complement the wealth planning needs of individuals and families. For more information,

visit bnymellonwealth.com.

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CHILTON TRUST

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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CIBC

CIBC PRIVATE WEALTH

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.

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DE 1931
Commonwealth
TRUST COMPANY

Commonwealth Trust Company, founded in 1931, has a long history of working with sophisticated and complex trusts for domestic and international clients. We focus on personal trust administration solutions which set us apart from any other trust company. Commonwealth is an advisor's perfect complement. We also work with trust companies and financial institutions outside of Delaware whose clients want to take advantage of Delaware law. Commonwealth - Independent. Knowledgeable. Experienced.

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EVERCORE | Wealth Management | Trust Company

THE NEW STANDARD IN WEALTH MANAGEMENT

Evercore Trust Company, N.A. works closely with its affiliate, Evercore Wealth Management, an investment advisor registered with the U.S. Securities and Exchange Commission, to serve high-net-worth families, endowments and foundations, delivering customized strategic wealth planning investment management, trust and custody services. Headquartered in Wilmington, Delaware, Evercore Trust Company is a national trust bank regulated by the Office of the Comptroller of the Currency, chartered in 2009.

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GREENLEAF TRUST®
DELAWARE

Greenleaf Trust Delaware is a premier wealth management firm specializing in goals-based wealth management and trust administration. As a privately held trust-only bank, our independence removes conflicts of interest, ensuring that our clients' best interests are our primary focus. Dedicated to fiduciary excellence and a client-centric philosophy, we uphold the highest standards in all we do. We establish client relationships starting at $2 million.

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Morris James LLP

The Morris James Tax & Estates practice stands out in the region with unmatched experience, deep knowledge, and expertise in taxation, strategic business planning, corporate transactions, and estate planning. Our proficiency in federal, state, and local tax issues ensures comprehensive and coordinated representation, offering clients insightful guidance and solutions tailored to their unique needs across the tri-state area.

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DELAWARE INDIVIDUAL TRUSTEE

THERESA L. HUGHES, MBA, CTFA, AEP®

Pinion Individual Trustee Services provides an alternative to family member or corporate trustees, bringing a unique combination of expertise, dedication, flexibility and openness to serve clients in ways that best fit their specific needs. Inquire about Talon Fiduciary Solutions for services such as Designated Representative, LLC Manager, Distribution Advisor, Trust Protector, and more. Pinion is proudly affiliated with Santora CPA Group.

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Santora CPA Group
Right, By Your Side

For over 42 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 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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U.S. TRUST

Bank of America Private Wealth Management

Bank of America Private Bank offers innovative and customized financial solutions to help meet unique lifestyle, family, business and philanthropic goals for wealthy individuals, families and institutions with complex wealth management needs. A coordinated team backed by more than 200 years of experience and the resources of one of the world's largest financial institutions works with each client to understand and address their needs. We apply deep wealth management expertise and financial acumen to deliver across a comprehensive range of capabilities, including wealth structuring, investment management, customized credit and banking, legacy and philanthropy, and family office services. To learn more about Bank of America Private Bank, please visit www.privatebank.bankofamerica.com.

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The American Bankers Association is the voice of the nation's $25 trillion banking industry, which is composed of small, regional and large banks that together employ approximately 2.1 million people, safeguard $19.7 trillion in deposits and extend $13.1 trillion in loans.

The Certified Trust and Fiduciary Advisor (CTFA) from the American Bankers Association The only wealth certification grounded in fiduciary principles. This designation goes beyond concepts, into practical application of prudent wealth management principles across all aspects of a client's financial life.

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https://www.aba.com/training-events/certifications/certified-trust-and-fiduciary-advisor

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Duane Morris®

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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Peak Trust Company

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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BRYN MAWR TRUST
COMPANY OF DELAWARE

A WSFS COMPANY

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 advisors 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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Campbell University's Trust & Wealth Management Program has the nation's leading degree program in Trust and Wealth Management, equipping students with the knowledge and skills to launch a rewarding career in a rapidly growing industry. The program prepares graduates to serve the financial needs of high net-worth individuals by managing their assets and developing and implementing sophisticated tax, financial and estate planning strategies.

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Citizens Trust Company of Delaware

Citizens Trust Company of Delaware ("CTCD") provides sophisticated Delaware trust solutions for our clients backed by the breadth, depth, and protections of Citizens Financial Group. We specialize in serving the complex needs of individuals and families seeking access to Delaware's favorable trust laws with professional oversight and personalized guidance. Our experienced team provides comprehensive wealth management services, including trust administration, investment management, and philanthropic solutions. We serve as trustee on both fully managed and directed trusts, providing a customized trustee experience and boutique service approach.

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A Delaware Trust May Be Right for You | Citizens Trust Company of Delaware

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DCF Make More Possible.
Delaware Community Foundation

The Delaware Community Foundation (DCF) is a nonprofit organization focused on partnering with donors to build opportunity and advance equity in Delaware. We are local experts in philanthropy and community knowledge, uniquely positioned to enhance services provided by professional advisors. The DCF offers flexibility and a range of charitable tools to make it easy for clients to have an impact and create a meaningful legacy.

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ESTATEABLY

Estateably is a cloud-based platform that empowers financial institutions, accounting firms and legal professionals to transform their trust and estate administration and accounting practices. We help over 1,000 firms and 5,000 practitioners across the United States and Canada streamline complex estate work, manage fiduciary accounting requirements, and deliver exceptional client service. Estateably puts powerful automation at the heart of your practice, so firms can handle probate forms, precedent letters, trust accounting, beneficiary reporting, tasks, contacts and inventory - all from one centralized platform. With SOC2 Type II certification and commitment to the highest security standards, we've earned the trust of professionals and practitioners who demand both security and excellence in their fiduciary practice management.

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FideliTrade Incorporated

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FideliTrade Incorporated in Wilmington, Delaware, is a leading full-service precious metals company specializing in sales, trading, custody, and delivery of gold, silver, platinum, and palladium bullion. Trusted for over 25 years, FideliTrade provides bullion straight from the source. This means FideliTrade acquires bullion directly from national and commercial mints. We service individual accounts, commercial accounts, and have experience working with financial institutions. Our customers have peace of mind knowing their assets and transactions are secure with FideliTrade.

FideliTrade provides a full range of precious metals sales, custody, operational and administrative support that enable banks, brokerage firms and other financial service organizations the ability to offer their customers, whether broker-dealers or individual retail and high net-worth individuals, a complete array of precious metals services

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JTC Group is a publicly listed, global professional services business with deep expertise in trust administration, fund, corporate and private client services with over 1,700 employees.

Our office in Wilmington, Delaware, serves affluent, high net worth and ultra-high net worth domestic and international families. We offer local administration of Delaware tax favoured trust situs, modern trust statues, customized trust administration and superior service under a global publicly traded brand. We also offer South Dakota and Wyoming trust services. We can either work with your existing advisors regarding investments, insurance, custody and illiquid assets or we are happy to recommend trusted advisors from our network. We administer trusts with both liquid and non-liquid assets, including LLCs, LPs and closely held stock, and we also work with offshore investments.

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KOPLIN
CONSULTING

Koplin Consulting is a nationwide concierge, in-home service for those struggling with challenges such as addiction, executive functioning, schizophrenia, bipolar, eating disorders, and more. We are passionate about providing life-changing help in real life and in real time. Koplin Consulting believes in building programs around people therefore each client receives a custom, tailored coaching plan based on an in-depth assessment.

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Peak Trust Company

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

DELAWARE INDIVIDUAL TRUSTEE

THERESA L. HUGHES, MBA, CTFA, AEP®

Pinion Individual Trustee Services provides an alternative to family member or corporate trustees, bringing a unique combination of expertise, dedication, flexibility and openness to serve clients in ways that best fit their specific needs. Inquire about Talon Fiduciary Solutions for services such as Designated Representative, LLC Manager, Distribution Advisor, Trust Protector, and more. Pinion is proudly affiliated with Santora CPA Group.

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WINSTON ARTORY GROUP

Headquartered in New York and operating globally, Winston Artory Group leads in intelligent stewardship of art and collectibles. Formed in 2025 through the merger of Winston Art Group and Artory, it delivers independent appraisals, data-driven advisory, and secure portfolio management. With a legacy of appraising over $100 billion in assets, the firm champions innovation, security, and objectivity—meeting the complex needs of collectors, fiduciaries, and institutions worldwide.

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2025 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 $1,495 for DBA/FEA members; $1,895 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 Duncan: renee.duncan@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 17, 2025, 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.

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.

Total Credits for
2025 Delaware Trust Conference = 17.5 CLE
applied for (DE & PA) (including 2.0 Ethics Credits),
CPE & ICB Credits Applied for.
Participants can earn up to 17.5 CPE credits in
Specialized Knowledge and Applications
field of study.