

2017 TRI-STATE

TRUST FORUM

SEPTEMBER 18-19, 2017

Marriott Residence Inn

Portsmouth Harbor Events Center

Portsmouth, NH



MAINE
BANKERS
Association

NH Bankers
ASSOCIATION

Vermont Bankers Association

VBA

2017 TRI-STATE TRUST FORUM

SEPTEMBER 18-19, 2017 | MARRIOTT RESIDENCE INN, PORTSMOUTH, NH

PRELIMINARY

AGENDA

MONDAY

SEPTEMBER 18

9:00 AM - 10:30 AM

EXHIBITOR SET UP

Accutech – Breakfast Sponsor
Fifth Third Bank – Reception Sponsor
J.P. Morgan Asset Management – Lunch Sponsor
American Funds
Broadridge Financial Solutions
FinTech Securities
FCI Advisors
ProxyTrust
Reich & Tang
Skinner Auctioneers & Appraisers

10:30 AM - 11:00 AM

REGISTRATION AND MEET THE EXHIBITORS/SPONSORS

11:00 AM - 11:05 AM

WELCOME

Cydney Shapleigh-Johnson, CTFA, EVP, Chief Wealth Management Officer
Bank of New Hampshire
NHBA Trust Committee Chair

Jeffrey B. Nowell, JD, SVP, Peoples United Bank
VBA Trust Committee Chair

11:05 AM - 12:00 PM

GLOBAL ECONOMIC FORECAST

Simona Mocuta, Senior Economist, VP
State Street Global Advisors

Responsible for monitoring and interpreting global economic developments, she will provide an economic forecast for the G8 complex.

12:00 PM - 1:00 PM

LUNCH

Sponsored by J.P. Morgan Asset Management

1:00 PM - 2:00 PM

UNIQUE CHALLENGES FACED BY MILLENNIALS PREPARING FOR RETIREMENT & HOW YOU CAN HELP BETTER PREPARE THEM

Lena Rizkallah, Retirement Strategist
J.P. Morgan Asset Management

This session will address the unique challenges that millennials may face in preparing for retirement and share research and insights on how advisors can help their millennial clients be better prepared for retirement. .

2:00 PM - 2:30 PM

AFTERNOON BREAK WITH EXHIBITORS/SPONSORS

2:30 PM - 4:00 PM

EMOTIONAL INTELLIGENCE – RESILIENCE: THRIVING AT WORK AND HOME

Bob Faw, Chief Ignition Officer
Matchbox Group

If you are ready to create more positive attitudes, more energy, more creativity, more productivity, and more fulfilling lives, this session will help you. You will focus on resilience and not on stress management and thrive both at home and work.

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AGENDA (CONTINUED)

MONDAY

SEPTEMBER 18

4:00 PM - 5:30 PM

EXHIBITOR RECEPTION

Sponsored By Fifth Third

Join us for a reception and peer discussions. Also take a little time to thank our sponsors/exhibitors for their support of our event.

TUESDAY

SEPTEMBER 19

8:15 AM - 9:00 AM

FULL BREAKFAST BUFFET

Sponsored By Accutech

THANK YOU SUPPORTING EXHIBITORS/SPONSORS

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VBA Trust Committee Chair

9:05 AM - 9:40 AM

TRI-STATE ECONOMIC FORECAST

Russell Thibeault, President

Applied Economic Research (AER)

A local economic update covering the tri-state region.

9:40 AM - 10:40 AM

REGULATORY KEYS TO SUCCESSFUL EXAMS

Nancy Daigle Renaud, Director of Trust Supervision, State of NH Banking Department

Amy Richardson, Senior Financial Examiner, Vermont Department of Financial Regulation

Mark Routhier, Case Manager, FDIC

Katarina Ireland, Examiner, FDIC

Jamie Marsh, Asset Lead Expert, OCC

Learn about the top violations and exam issues and how to avoid them.

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AGENDA (CONTINUED)

TUESDAY

SEPTEMBER 19

10:40 AM - 11:00 AM

MORNING BREAK WITH EXHIBITORS/SPONSORS

11:00 AM - 12:00 PM

THE DIFFERENCES BETWEEN TRUST LAWS IN NORTHERN NEW ENGLAND

Christopher R. Paul, Director and Vice Chair of the Trusts and Estates Department
McLane Middleton

Know the difference in trust laws in Northern New England. The state where your client lives may not be the best state for the client's trust. The differences every trust professional should know will be covered.

12:00 PM

ADJOURNMENT

ACCOMMODATIONS

Accommodations will be at the Residence Inn by Marriott Downtown Portsmouth, 100 Deer Street, Portsmouth, NH 03801.

Reservations must be made by **Friday, August 18, 2017** to receive the group rate of 205.00 for single or double occupancy, plus 9% tax.

TO MAKE RESERVATIONS:

- Call 603-422-9200 and use Group Reference: TRI
- For online reservations, click [here](#).

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REGISTRATION

MEMBER ORGANIZATION: _____

CONTACT: _____

PHONE: _____

ADDRESS: _____

EMAIL: _____

REGISTRATION FEE: \$289.00 per Banker/FTC/Associate Member; \$189.00 each additional

Name (include Nickname)	Email Address	Reg. Fee
		\$
		\$
		\$
		\$
		\$
Total Enclosed		\$

Please register by **Monday, September 11, 2017.**

3 ways to register:

1. Complete the registration form and mail to NHBA, PO Box 2586, Concord, NH 03302-2586
2. Scan and email your registration to Laurie Naro at lnaro@nhbankers.com
3. Register online at www.nhbankers.com under the Upcoming Events section

NHBA Cancellation Policy

Registrations may be canceled prior to Monday, September 11 by notifying the NHBA office at (603) 224-5373. Refunds are subject to a \$25 per person fee. Any cancellations received after September 11 are not refundable but are transferable to another individual from your bank who wishes to attend this conference. All registrations received by fax, email or online are subject to this policy.

Consent to Use of Photographic Images

Registration and attendance at, or participation in, NHBA meetings and other activities constitutes an agreement by the registrant to the NHBA's use and distribution (both now and in the future) of the registrant or attendee's image or voice in photographs, videotapes, electronic reproductions and audiotapes of such events and activities.

Due to Omnibus Budget Reconciliation Act of 1993, \$122 (meals) is not deductible as a cost of doing business.