

MAINE BANKERS Association

TRUST & WEALTH MANAGEMENT CONFERENCE

MAY 5, 2021 | 12:30-3:30 PM | ZOOM

Agenda

12:30 PM Welcome & Introductions

12:35 PM *Light at the End of the COVID Tunnel*

Philip Orlando, CFA, Chief Equity Market Strategist, Federated Hermes, Inc.

Phil joined Federated Hermes in 2003 and has over 40 years of experience. In his position, he is responsible for helping to formulate Federated Hermes' opinions on the securities markets.



1:30 PM Break

1:35 PM *Becoming a Top Performing Trust & Wealth Organization*

E. Loyd Pohl, CEO, Pohl Consulting and Training, Inc.

Loyd's diverse background in the Financial Services industry includes Bank Management, Trust & Investment Management, and Agricultural & Commercial Lending. He began his banking career in 1981, his consulting career in 1992, and he purchased the firm in 2000.



2:30 PM Break

2:35 PM *Update on Regulation & Legislation Affecting Trust & Wealth Management Business*

Phoebe Papageorgiou, Vice President, Trust Policy, American Bankers Association

Phoebe covers regulatory and legislative developments of interest to trust bankers. She manages the advocacy efforts of ABA's Trust Taxation and Trust Counsel Committees, as well as the IRA Steering Committee and the Nonprofit and Philanthropy Working Group. Before joining ABA, Phoebe worked for the U.S. Department of the Treasury in the Office of Domestic Finance.

3:30 PM Adjournment

**CREDITS WILL BE AVAILABLE
FOR CTFA, CFP, and CLE**

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Attendee Registration Form

Member Banker or Affiliate Member: \$175 | Non-Member: \$275

Company: _____

Contact: _____ Email: _____

Attendee Name

Attendee Email

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Fees:

_____ Member Banker/Affiliate Member Attendees @ \$175 each = \$_____

_____ Non-Member Attendees @ \$275 each = \$_____

Method of Payment:

Please Invoice (name and email): _____

Check Enclosed

Credit Card (Please contact Jaimie Drew jdrew@mainebankers.com for payment)

Please email registration form to: jdrew@mainebankers.com

Questions? Contact Jessica Verry: jverry@mainebankers.com