

2021 TRI-STATE TRUST FORUM

SEPTEMBER 30 & OCTOBER 1, 2021

AC Hotel by Marriott

Portsmouth, NH

The New Hampshire Bankers Association, in cooperation with the Maine Bankers Association and Vermont Bankers Association, Inc. Trust Committees, invites you to attend this year's virtual Tri-State Trust Forum.

MAINE
BANKERS
Association

NH Bankers
ASSOCIATION

Vermont Bankers Association
VBA

2021 TRI-STATE TRUST FORUM

SEPTEMBER 30 & OCTOBER 1, 2021 | AC HOTEL BY MARRIOTT, PORTSMOUTH, NH

AGENDA

THURSDAY

SEPTEMBER 30

10:00 AM – 12:00 PM

EXHIBITOR & SPONSOR SET UP

12:00 PM – 1:00 PM

LUNCH WITH THE EXHIBITORS

1:00 PM – 1:10 PM

WELCOME

Valerie Nevel, VP, Senior Financial Advisor - Ledyard Financial Advisors
Chair, NH Bankers Trust Committee

Charles J. Perrillo Jr., CFP, SVP-Chief Trust Investment Officer
Community Bank Trust Services
Chair, Vermont Bankers Association Trust Committee

1:10 PM – 2:10 PM

INTERNATIONAL MARKETS

Peter Smith, Vice President Client Portfolio Manager
Federated Hermes

A view of the economies and the equity markets in the regions you invest.

2:10 PM - 3:00 PM

CRYPTO - WHAT IS IT AND WHAT POTENTIAL ISSUES AND PITFALLS DO TRUST DEPARTMENTS FACE

Ethan McLaughlin and **Aaron Forenc**, VT DFR

Bitcoin, alternatives like Venmo, unregulated platforms – what are the issues and pitfalls you and your Trust departments face.

3:00 PM - 3:15 PM

AFTERNOON BREAK WITH EXHIBITORS

3:15 PM - 4:15 PM

HOW DIGITAL ACCOUNT OPENING FITS IN A DIGITAL TRANSFORMATION STRATEGY

Jeremy Peterson, Digital Experience Sales Manager
Accutech

More than four out of five consumers (82%) say they are less likely to switch financial institutions once they become accustomed to their firm's digital services. How do your account opening tools stack up with the trends in digital banking? How does account opening fit into your digital transformation? This session is an introduction to digital transformation and understanding how digital account opening tools play a key role in digital transformation, business development, and marketing strategies.

4:15 PM - 5:15 PM

EXHIBITOR RECEPTION

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

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FRIDAY

OCTOBER 1

9:00 AM – 9:10 AM

WELCOME

Valerie Nevel, VP, Senior Financial Advisor - Ledyard Financial Advisors
Chair, NH Bankers Trust Committee

Charles J. Perrillo Jr., CFP, SVP- Chief Trust Investment Officer
Community Bank Trust Services
Chair, Vermont Bankers Association Trust Committee

9:10 AM – 10:10 AM

HOW TO DEAL WITH CLIENT MENTAL HEALTH

Arden O'Connor, Founder
O'Connor Professional Group

Are you a wealth advisor concerned for your clients? In this session, you will learn detailed ways of identifying clients in need of help and how to address those sensitive situations. Arden founded the O'Connor Professional Group to address behavioral issues in families and individuals. She is passionate about helping families and individuals navigate the treatment system that creates positive outcomes.

10:10 AM – 10:25 AM

MORNING BREAK WITH THE EXHIBITORS

10:30 AM – 11:30 AM

THE INCOME PARADOX AND ITS IMPLICATION ON PORTFOLIO CONSTRUCTION

Nick Macrina, CFA, Senior Portfolio Specialist
Financial Advisor Services Division (FAS)
Vanguard

Combination of a fixed income landscape analysis and outlook review of the fixed income environment while emphasizing the importance and role of Bonds.

11:30 AM – 12:15 PM

BE PREPARED, BE EMPOWERED. KEY QUESTIONS WOMEN SHOULD BE ASKING TO NAVIGATE THEIR FINANCIAL FUTURES

Leslie Geller, Wealth Strategist
Capital Group

All women should expect to be solely responsible for their financial well-being at some point in their lifetime. Learn how to help your clients ask the right questions and engage with both spouses to build relationships that are independent of the marriage; understand individual biases, perspectives and priorities; and communicate with both spouses, together and separately, to encourage transparency and trust.

12:15 PM

ADJOURNMENT