

Trust & Wealth Management Conference



Agenda

- 8:30AM **Registration & Continental Breakfast**
- 9:00AM **Welcome & Introductions**
- 9:05AM **Justin Underwood, Executive Director, ABA Securities Association/VP, Banking Policy, America Bankers Association**
Updates from Washington including the Build Back Better Plan, cannabis updates, what is happening now, and what to expect on the state and national level.
- 10:00AM **Break - Sponsored by Salvation Army**
Introduction of Vendors
- 10:15AM **John Rogers, Senior Information Security Consultant, Monarch ISC**
Cybersecurity Awareness, Fraud, and the World of Intangible Assets
This session will focus on demystifying the often shifting and always unsettling cybersecurity landscape, the threats and threat actors we all face, including the primary threat Social Engineering. We'll give you real-world advice on how to protect yourself, your business, and your customer/clients from cybercrime. We'll also illuminate the unfamiliar territory of crypto-currency, NFTs, and the Metaverse.
- 11:15AM **Phil Orlando, Senior Vice President, Chief Equity Market Strategist, Federated Hermes**
Current Economic Update - 2022 and Beyond
- 12:15PM **Lunch - Sponsored by Federated Hermes**
- 1:15PM **Barbara Schlichtman, Attorney at Law, Perkins Thompson**
Updates and changes to Maine's probate code.
- 2:15PM **Break**
Introduction of Vendors
- 2:30PM **Amy Anderson, Director of Gift Planning, Salvation Army**
Retirement Jeopardy
Retirement Jeopardy mixes silly and sensible estate planning trivia—from taxes & trusts to stocks & social security with a splash of nursery rhymes and world history. If you serve on a nonprofit board of directors, you can use this game to stimulate dialogue around charitable gift planning. Participants will leave this presentation with a set of Jeopardy questions and answers with just enough information to be helpful (not dangerous) regarding planned giving with non-cash assets.
- 3:30PM **Adjournment**

Credits have been applied for and will be available at the conference.