Maine Bankers Association

2023 Trust & Wealth Management Conference

May 24 | 8:30 AM - 3:30 PM | Harraseeket Inn, Freeport

Agenda

8:30 AM **Registration and Breakfast**

9:00 AM **Welcome & Brief Remarks**

Jim Roche, President, Maine Bankers Association

Blaine Boudreau, President & CEO, Partners Bank

9:15 AM **Vendor Introductions**

9:45 AM ***Resilience in a Year of Uncertainty***

Paul Lally, Principal, Wipfli LLP

From where we have been, to where are a going, and what you can do to find sustainability in your Trust & Wealth divisions.

10:45 AM **Refreshment Break with Vendors**

11:00 AM ***Sustainable Investment Guidance for Your Clients***

Jared Kelly, Principal, Wolf & Company, P.C.

As interest in this emerging asset class grows, advisors will learn in this session how to inform, guide, and protect their clients.

12:00 PM **Luncheon Keynote:** ***The Advice You Offer Today Will Change Lives***

Philip Harriman, Co-Founder, Lebel & Harriman Retirement Advisors, LLP

About 10,000 people a day wake up to their 65th birthday and this will continue for years to come. Many have created or inherited wealth they seek to pass on to the next generation. These potential clients will transfer wealth and are yearning for an advisor who they trust, will offer choices for them that is in their best interest, not someone who is meeting a sales goal. The advice you offer today can change your clients and their family's lives in meaningful ways. Phil will share how to first help your client develop a clear vision of where they are now and set a financial course which aligns head, heart and stomach for themselves, their heirs, employees, and charitable organizations they care about when it comes to their wealth. Most advisors want to impress the client with their knowledge and track record, which are very important, Phil will share how to establish and demonstrate that what matters most is that the client feels heard and understood. Then knowledge and experience are used to motivate the client to implement their financial strategies to accomplish their goals.

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AGENDA CONTINUED

1:00 PM ***Benefits of Trusts for Assets Less Than $5-10 Million***

Kristy Hapworth, Partner, Rudman Winchell

Minimization of federal estate tax is only one of many reasons a trust may be used in estate planning. Trusts serve a number of important purposes – such as asset protection, probate avoidance, and special need planning – that may be particularly relevant to individuals or couples with estates falling under the federal estate tax exemption. This session will provide an overview of the ways trust planning may benefit clients with a net worth in the $5-10 million range.

2:00 PM ***ABA Trust & Regulatory Update***

Tim Keehan, Vice President and Senior Council, ABA

ABA will provide the latest legislative and regulatory initiatives driving and directing trust and wealth management activities, operations, and compliance. Topics will include the recently enacted SECURE 2.0 and federal policies and proposals on fiduciary investment advice, IRA rollovers and RMDs, ESG investing, trust department administration, and asset management.

3:00 PM **Sweet Treat with Vendors**

3:30 PM **Adjourn**