MAINE BANKERS Association

2023 TRUST & WEALTH MANAGEMENT CONFERENCE

SPEAKER BIOS

Paul Lally, Wipfli LLP

Paul leads Wipfli's multi-disciplinary team offering services to the wealth and asset management industry. Leveraging more than 30 years of experience, he helps clients navigate the growth and long-term success of their business. Paul has delivered keynote speeches to thousands of executives from a multitude of companies. Paul has extensive knowledge of wealth and asset management industry trends, the transformations going on within various companies and the realities of operating a privately -owned financial services firm in today's market.

Jared Kelly, Wolf & Company, P.C.

Jared is a Principal in Wolf's Assurance Group and leads the Firm's Cleantech and Consumer and Industrial sectors. With over 13 years of experience in the field, he coordinates and supervises audit, review, and compilation services for middle-market and start-up companies. His clients are often private equity-owned or venture-backed, and he also has significant experience working with U.S. Securities and Exchange Commission (SEC) registrants.

Philip Harriman, Lebel & Harriman Retirement Advisors, LLP

For over 40 years, Phil has worked with family and non-profit businesses in the areas of retirement, business succession, legacy, and estate planning. He has worked with hundreds of business owners assisting them in collaboration with their legal, and tax advisors to deliver financial results which align their head, heart and stomach to achieve their personal and business goals. Phil was elected four times to the Maine Senate. Senator Harriman served on the Health and Human Services, Business and Economic Development, Natural Resources, Utilities & Energy and Appropriations Committees. He also currently delivers political analysis on the NBC affiliate News Canter Maine and writes a weekly column -Agree to Disagree-for the Bangor Daily News.

Kristy Hapworth, Rudman Winchell

Kristy focuses her practice on estate and trust law, assisting individuals and families with estate planning, wealth transfers, trust and estate administration, guardianship and conservatorship proceedings, and other probate matters. She is dedicated to developing creative plans and finding practical solutions to her clients' legal issues. For her work in Trusts and Estates, Kristy received recognition in the 2023 edition of Best Lawyers: Ones to Watch in America. She was also recognized in the 2022 and 2023 editions for her work in the field of Trusts and Estates Litigation.

Timothy Keehan, ABA

Tim is Vice President & Senior Counsel at the American Bankers Association. He works in the areas of trust and wealth management, fiduciary activities, investment funds and advice, and ERISA. Prior to joining ABA in 2011, Tim was a Partner in the Banking and Finance Group at Mayer Brown LLP and a Partner in the Financial Regulatory Group at Latham & Watkins LLP.