Maine Bankers Association

2024 Trust & Wealth Management Conference

May 8 | 9:30 AM - 4:30 PM | Hilton Garden Inn, Auburn

Agenda

9:30 AM **Registration, Light Morning Refreshments & Networking**

10:30 AM **Welcome & Brief Remarks**
Jim Roche, President, Maine Bankers Association

10:35 AM **Vendor Introductions**

10:45 AM ***The How-Tos of Working with Grieving Clients***
Kelly Blanchette, Hospice of Southern Maine
Grief is a universal human experience, but it can be uncomfortable to sit with grieving people. Join us for a presentation exploring what grief is, when it can happen, and the many ways it can affect us. Learn how to recognize grief in yourself and others, as well as strategies to support grieving clients in your daily work and how to cope with the challenge of holding the grief of so many.

11:45 AM **Luncheon**

12:45 PM ***Orlando's Outlook: Washington Driving the Bus in 2024***
Phil Orlando, Federated Hermes
Take a drive with Phil Orlando, CFA, Chief Equity Strategist of Federated Hermes Inc, where the conversation will cover the Economy, Consumers, Housing, Inflation, and Market Positioning. However, with it being 2024, "Orlando's Outlook: Washington Driving the Bus" will offer insights into this election year, market behavior from a historic perspective in election year cycles and offer thoughts on how markets might behave. Overall, Phil takes a thoughtful approach in his presentation with an always smooth and passionate delivery that is about supporting your efforts in asset allocation, investment management, and most of all aiding in your client engagement and conversations.

1:45 PM **Refreshment Break with Vendors**

2:00 PM ***Estate and Tax Updates: Hot Topics and Planning Opportunities***
Caitlin DiMillo, Spinnaker Trust
Griffin Leschefske, Pierce Atwood
Highlights include:

- *Discussion of the Corporate Transparency Act impact on trusts and estates*
- *Discussion of 2025 federal exemption and other sunsetting provisions of Tax Cuts and Jobs Act (TCJA) of 2017*
- *Discussion of estate and income tax basis planning opportunities given current tax landscape, with workable examples*

3:00 PM ***Moderated Roundtable Discussion***
Pre-submitted talking points with moderation by the Trust & Wealth Advisory Group

4:00 PM **Happy Hour Networking with Vendors**