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**
Maine Bankers Association

10:35 AM **Vendor Introductions**

10:45 AM ***Strategies for Working with Grieving Clients***
Kelly Blanchette, Hospice of Southern Maine
This session is designed for Trust and Wealth Advisors seeking to elevate their professional practice by deepening their understanding of grief and refining their skills in guiding clients through this sensitive terrain. Join us for an insightful exploration that combines empathy, expertise, and practical strategies to make a lasting impact on your clients' lives during their most vulnerable moments.

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
T. 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 ***Engaging Business Owners in the Transition Discussion***
Paul Lally, Wipfli
Unlock the secrets to seamless business transitions with expert guidance on strategic transition planning. Dive into critical challenges, explore the link between personal and business wealth, and discover actional tips for crafting successful transition plans. Overcome common obstacles and excuses and learn the pivotal role of wealth advisors in navigating emotional and financial dynamics. Revolutionize your approach to guiding your business owner clients through their succession planning. This session will help you:

- *Understand the challenges and importance of transition planning for business owners.*
- *Explore actionable tips and strategies for successful transition planning.*
- *Learn about the pivotal role of wealth advisors in orchestrating seamless transitions.*
- *Gain insights into overcoming common obstacles and excuses delaying transition planning.*

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