MAINE BANKERS Association

2024 TRUST & WEALTH MANAGEMENT CONFERENCE

MAY 8 | 9:30 AM - 4:30 PM | HILTON GARDEN INN, AUBURN

SPEAKER BIOS

Kelly Blanchette, Hospice of Southern Maine

Kelly is the bereavement services manager at Hospice of Southern Maine. She obtained both degrees and professional certifications in child life (Wheelock College, BA, CCLS) and thanatology (Marian University, MS, CT), and spent nineteen years working as a child life specialist in pediatric hematology/oncology before joining the HSM team. She has presented at local and national conferences and is passionate about helping people understand what grief is and supporting them through it.

Phil Orlando, Federated Hermes

Phil is Federated Hermes' chief equity strategist and the head of the Client Portfolio Management team. He joined Federated in 2003 and has over 40 years of experience. Throughout his career, Phil has been recognized for his ability to accurately synthesize the interrelationship among highly complex financial, economic and political market development, and translate them into easily understandable concepts. For more than 25 years, Phil has been a regular contributor to the financial media, including CNBC, Bloomberg, Fox Business News, Reuters, The Wall Street Journal and the New York Times.

Caitlin DiMillo, Spinnaker Trust

Caitlin draws on her experience as a trusts and estates attorney to work with our clients on complex issues of wealth transfer, estate, gift and tax planning. She's a great listener and works hard to earn our clients' trust. Caitlin also volunteers her time as a member of the boards of Pine Tree Legal Assistance and the Maine Estate Planning Council.

T. Griffin Leschefske, Pierce Atwood

Griff's practice centers on estate planning, charitable giving, and probate, trust, and fiduciary litigation, in which he represents all types of clients. Griff also represents charitable organizations, educational institutions, and corporate clients with respect to planned giving and philanthropy matters. In his estate planning practice, Griff provides counsel on wealth transfer and charitable planning. He also represents clients faced with unexpected trust and estate administrative problems arising after death. Griff has notable experience with trust and estate litigation, where he provides comprehensive, solution-focused representation at all phases of controversy.

Paul Lally, Wipfli

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. As an industry speaker, Paul is known for his lively, on-target delivery of timely topics, practical strategies and thought-provoking insights. He has delivered keynote speeches to thousands of executives from a multitude of companies. Additionally, 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.