

2020 VIRTUAL TRI-STATE TRUST FORUM

SEPTEMBER 21-22, 2020



The New Hampshire Bankers Association, in cooperation with the Maine Bankers Association and Vermont Bankers Association, Inc. Trust Committees, invites you to attend this year's virtual Tri-State Trust Forum.

MAINE
BANKERS
Association

NH Bankers
ASSOCIATION

Vermont Bankers Association
VBA

2020 TRI-STATE TRUST FORUM

SEPTEMBER 21-22, 2020 | VIRTUAL

AGENDA

MONDAY

SEPTEMBER 21

1:00 PM - 1:15 PM

PLATINUM SPONSOR ROOMS OPEN

1:15 PM - 1:25 PM

WELCOME

Valerie Nevel, VP, Senior Financial Advisor - Ledyard Financial Advisors
Chair, NH Bankers Trust Committee

Daniel Kimbell, EVP, Managing Director, Passumpsic Financial Advisors
Chair, Vermont Bankers Association Trust Committee

1:25 PM - 2:25 PM

EXPLORING A DYNAMIC SPENDING POLICY – AN ALTERNATIVE TO TRADITIONAL THOUGHT

Vanguard – Speaker TBD

2:25 PM - 2:45 PM

PLATINUM SPONSOR ROOMS OPEN

2:45 PM - 4:15 PM

ETHICS FOR FINANCIAL ADVISORS & TRUST OFFICERS
The Knowledge Institute, LLC

4:15 PM - 5:00 PM

NETWORKING AND FUN!

TUESDAY

SEPTEMBER 22

9:00 AM - 9:15 PM

PLATINUM SPONSOR ROOMS OPEN

9:15 AM - 9:30 AM

WELCOME

Valerie Nevel, VP, Senior Financial Advisor - Ledyard Financial Advisors
Chair, NH Bankers Trust Committee

Daniel Kimbell, EVP, Managing Director, Passumpsic Financial Advisors
Chair, Vermont Bankers Association Trust Committee

9:30 AM - 10:15 AM

LEGISLATIVE & FIDUCIARY ISSUES FROM WASHINGTON

Phoebe A. Papageorgiou
Vice President, Trust Policy
American Bankers Association

Catch the latest regulatory and legislative developments affecting the trust and wealth management industry, with a focus on banking and securities rulemaking.

10:15 AM - 11:00 AM

ECONOMIC UPDATE
Speaker Invited

11:00 AM - 11:10 AM

PLATINUM AND GOLD SPONSOR DOOR PRIZES / ADJOURNMENT