

# Kansas Bankers Association Trust Division

## 2020 - 2021 Annual Report



**Trust Division**

A DIVISION of KBA

*Presented by the 2020-2021  
KBA Trust Division Board of Directors*

This past year serving as President of KBA Trust Division has been rewarding and a privilege. During the past year we have endured many changes in the trust industry, especially with the pandemic. It was uncertain territory; however, we managed to hold both the MOKAN Trust Conference and KBA Trust Division Conference in person with great speakers and networking. It is the continued goal of the KBA Trust Division board to uphold the reputation of being an outstanding and recommended conference for our peers and vendors to attend each year.

As President, I was able to serve on the KBA Board of Directors and several KBA committees, but I was not able to attend the meetings in person due to the pandemic. However, I was able to attend many meetings via Zoom. Being a part of the KBA Board of Directors gave me insight into the many tasks and roles of the KBA staff and team. I appreciate the staff at KBA for their guidance and help during such a crazy year, especially LeAnn Mott, Brenda Unruh, Sara Blubaugh, Doug Wareham, Kathy Taylor, and Alex Orel! The KBA has an amazing team and is the backbone to Kansas banking and trust services.

I also want to thank all involved in the trust industry for your continued support and attending the conferences held by the KBA Trust Division and KBA staff on an annual basis. I feel confident that you will enjoy incoming President Brian Dutton and he will do a great job with his leadership and role as President this coming year.

As quoted by Benjamin Franklin, ***"Tell me and I forget, teach me and I may remember, involve me and I learn."***

Thank you!

**Susie Roberts, VP & Trust Officer - Bank of Labor, Shawnee**  
***Immediate Past President of the KBA Trust Division Board***



## 2021 - 2022 KBA TRUST DIVISION BOARD OF DIRECTORS

The last 12 months have been stressful and chaotic as we grappled with the horrible implications of the COVID-19 pandemic, and unfortunately it is still not over. It would be an understatement to say that lives around the world have been disrupted by this virus. Throw on top of that the Reconciliation Bill and we are left to wonder what else we can we deal with. With all of the negativity going on, I proudly point out the one positive that is always here for all of us - the KBA Trust Division.



The KBA Trust Division is first and foremost a place to educate and support the trust professional. The mission remains the same as it always has: to identify and focus on issues that affect Trust Division members and our clients in order to enhance and promote our industry in Kansas. The KBA staff is top notch and is always willing to help out. Special shout out to Brenda and LeAnn. Without them the Trust Division would simply not operate.

I want to thank Susie Roberts for her leadership this past year. Her term was actually extended due to COVID-19 and she was a trooper through all of it. I look forward to serving this year and encourage everyone to please send questions, comments, or even concerns to the KBA Trust Division via [trust@ksbankers.com](mailto:trust@ksbankers.com).

**Brian Dutton**

*President of the KBA Trust Division Board*



***2020-2021 KBA Trust Division Board***

## 2020 KBA TRUST CONFERENCE FIRST EVER VIRTUAL CONFERENCE!

The 2020 KBA Trust Conference had its first ever virtual conference! This year's program once again had a phenomenal speaker line-up over the course of two mornings! We also had several of our valued sponsors join in on making this a very successful virtual experience!

Attendees were welcomed by KBA Trust Division President Joe Karnes and KBA Chairman Jonathon Johnson. The conference opened with Dr. Larry Divers, Executive Vice President of Cannon Financial Institute. Larry brought a comprehensive knowledge of investments, retirement plans and wealth management into his session. He guided the attendees on how to implement and monitor the provisions of the CARES Act and Secure Act as well as the IRS Notice 2020-50 and the new required minimum distribution rules under IRS Notice 2020-51.

Patrick Smith, Vice President with J.P. Morgan Asset Management then introduced Dr. David Kelly, Chief Global Strategist and Head of the Global Markets Insights Strategy Team. Dr. Kelly shed light on our current investment outlook and opportunities we are seeing across the global markets. He also shared his perspectives on key topics from the economic growth, employment, COVID-19, consumer confidence, implication of monetary and fiscal stimulus and more.

The closing speaker for the first morning was Jeff Bottenberg, Vice President of Trust and BOK Financial. Jeff discussed the statutory ethical duties that trust officers must follow when administering trusts and fiduciary accounts. He also discussed the Kansas Rules for Professional Conduct that apply to attorneys that serve as fiduciaries. These Rules were further explained and clarified by case law. Kicking off the second morning of the KBA Trust Conference was Jack Liekar, Vice President and Senior Regional Consultant with Federated Hermes, our Platinum Sponsor. He introduced the opening speaker for the morning, Linda Duessel, Senior Equity Strategist with Federated Hermes. Linda discussed the unprecedented global response by fiscal and monetary authorities. She also talked about the economy and what to expect for jobs and consumers and the market and what investors can expect. The market structure and its effect on trading and stocks and a look at regions and styles of investing were also included in her presentation. In conclusion, Linda went over what happens when the dust settles regarding the election, social distancing and the good and bad news for long-term investors.

Our closing keynote this year was our good friend, Rocky Miskelly, President of Renasant Wealth Management and Senior Trust Officer for Renasant Bank. Rocky gave some great advice and tools on how to continue selling during a pandemic. Communication is key and thinking outside the box. Be sure to always add value in some way shape or form and continue to have conversations that are meaningful. If possible, invest in technology so the opportunity for e-signatures are available. Don't be afraid to host client appreciation events as well! Rocky's message was very encouraging in these uncertain times!

The conference adjourned.



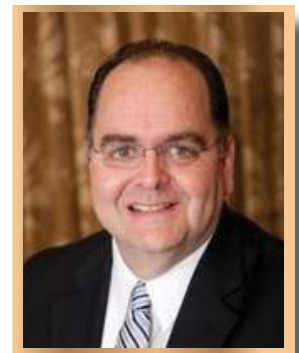
**Linda Duessel**  
CFA, CPA, CFP -  
Federated Hermes



**Dr. David Kelly**  
Chief Global Strategist  
- Global Market Insights



**Dr. Larry Divers**  
EVP - Cannon Financial  
Institute



**Rocky Miskelly**  
President - Renasant  
Wealth Management,  
Senior Trust Officer -  
Renasant Bank

# Save the Dates

## 2022 KBA Trust Conference

**October 20-21, 2022**

*Hilton Garden Inn &  
Convention Center  
Manhattan, KS*



## 2021 - 2022 KBA Trust Division Board

**Brian Dutton**

President  
Community National Bank & Trust

**Lori Bone**

Vice President  
Fidelity State Bank & Trust Company

**Joe Karnes**

Past President & Legislative Representative  
Central National Bank

**Lori Kugler**

Director (elected 2020)  
First National Bank and Trust

**Tasha Bucher**

Director (elected 2021)  
The Trust Company of Kansas

**LeAnn M. Mott**

Staff  
Kansas Bankers Association

**Chris English**

President Elect  
The Trust Company of Kansas

**Susie Roberts**

Immediate Past President & MOKAN Treasurer  
Bank of Labor

**Mark Kennedy**

Director (elected 2019)  
Citizens State Bank & Trust Company

**Sherri Gormley**

Director (elected 2020)  
First National Bank Hutchinson

**Brenda L. Unruh**

Staff  
Kansas Bankers Association

## 2022 MOKAN Trust & Financial Services Conference



**May 11-13, 2022**

*Sheraton Overland  
Park Hotel at the  
Convention Center  
Manhattan, KS*