

2022 KBA TRUST CONFERENCE



Trust Division

A DIVISION of KBA

October 20 & 21, 2022

Hilton Garden Inn - Manhattan, KS



2022 KBA TRUST CONFERENCE

Thursday, October 20

10:00 - 10:45 a.m.

Registration

10:00 - 3:30 p.m.

Sponsor Exhibits Open

10:45 - 11:00 a.m.

Welcome and Announcements

Brian Dutton, KBA Trust Division President

11:00 - 12:00 p.m.

Investing in the World of Sticky Inflation

Michael Stillitano, JP Morgan

A receding pandemic unleashing powerful pent-up demand and escalating geopolitical tensions in commodity intensive parts of the world are sending prices higher across a variety of sectors. While some of these price pressures may be transitory, others may hang around for some time, namely higher wages, rising inflation expectations and rising home/rent prices, further complicating monetary policy. We'll explore how higher inflation and more hawkish central banks will impact the investment landscape over the medium- to long-term.

12:00 - 1:00 p.m.

Lunch and Tradeshow

1:00 - 2:00 p.m.

Banking is a Marathon - How to Stay Motivated

Motivational & Keynote Speaker Matt Jones

Your attendees will laugh, be motivated, and learn strategies that they can use to attain greater VICTORY. Matt will inspire your attendees to be motivated to cross their Finish Line and achieve greater Victory! This will be accomplished through his against all odds story of conquering cancer three times, surviving a bone marrow transplant, relearning how to walk, and completing marathons around the world.

2:00 - 2:30 p.m.

Introduction of Business Partners/Refreshment Break

2:30 - 3:30 p.m.

Ethics - A Smattering

Matt Hoy, Stevens & Brand

Trust officers are confronted with ethical issues which require attention when administering trusts. Consideration must be given as to whom such duties are owed and what rules are often present for consideration. This session will address applicable attorney ethical obligations and suggested best practices in order to remain in compliance with ethical standards and requirements.

3:30 - 3:45 p.m.

Refreshment Break

3:45 - 4:45 p.m.

Economic Update

Dr. Roger Tutterow, Kennesaw State University

In this session, Dr. Roger Tutterow provides a timely overview of global, national and regional economies including recent developments in the effect of COVID-19 on the retail sector and real estate, the causes and effects of the recent changes in energy prices, the structure and effect of recent fiscal stimulus and the linkages between trade policy and currency valuation.

4:45 - 5:15 p.m.

KBA Trust Division Annual Meeting

5:15 - 6:15 p.m.

Reception - Sponsored by



Friday, October 21

7:00 - 7:45 a.m.

Buffet Breakfast/Exhibits Open

7:45 - 8:45 a.m.

Economic Assessment and Fixed Income Outlook

Bill Ehling, Federated Hermes

Interest rates and the economy are inherently linked in a hand in glove relationship. The program will describe Federated's assessment of the current state of both the U.S. and global economies and the opportunities available in the fixed income markets in light of that assessment.

8:45 - 9:45 a.m.

Cryptocurrencies Demystified

Linda Duessel, Federated Hermes

Bitcoin has been around since 2008, but its price, size in the market, and transaction volume has exploded in just the last few years. Most investors are aware of its existence, but they know very little else. Increasingly, investors and their advisors are asking whether Bitcoin should be held in portfolios. The blockchain has been called one of the most disruptive innovations since the advent of the internet. The presentation explains the concept, and many others that are important to understand, as well as opportunities and risks in cryptocurrencies in general, and Bitcoin in particular.

9:45 - 10:00 a.m.

Refreshment Break

10:00 - 11:00 a.m.

Fiduciary Advice Expanded for Retirement Discussions

Larry Divers, Cannon Financial

The DOL expanded the interpretation of fiduciary advice as described in the preamble to the prohibited transaction exemption (PTE 2020-02). In addition, in the preamble to the PTE, the IRS and the DOL announced an expanded interpretation of fiduciary advice which means more financial institutions are fiduciaries for their recommendations to Retirement Investors, and therefore will need the protection provided by the exemption. This presentation reviews the PTE 2020-02 disclosure requirements and outlines how financial professionals in compliance teams can adequately meet them.

11:00 - 12:00 p.m.

2022 Tax Changes

Larry Divers, Cannon Financial

Several large tax breaks were enacted during the 2021 tax year by the American Rescue Plan, which was signed into law in March 2021; however, most of those tax law changes expired at the end of 2021. As a result, the Child Tax Credit, Child and Dependent Care Credit, Earned Income Credit, and other popular tax breaks are different for the 2022 tax year. Additionally, this presentation will include a summary of the key provisions of the SECURE ACT 2.0 that is highly likely to have been passed by the time of the conference.

12:00 p.m.

Conference Adjourns

CE Details: Kansas CLE and ABA Professional Certification Credits available.

Suggested Attire:

The suggested attire for this year's conference is business casual. Remember, meeting room temperatures and personal comfort zones vary. It is recommended that you bring a sweater or a jacket to the sessions. If you should have any questions, please contact LeAnn Mott (lmott@ksbankers.com) at the KBA office, 785-232-3444.

Hilton Garden Inn, Manhattan, Kansas Room Block Details:

To expedite your reservation – BE SURE TO:

1. Click on the web page address in purple font below to access the Hotel Reservation Link (The link pre-populates your group code)
2. Select the Room Type offered in the Link
3. Make reservations as soon as possible. The special room rate will be available until Friday, Sept 23, 2022, or until room block is sold-out, whichever comes first.

YOUR EVENT LINK: <https://www.hilton.com/en/attend-my-event/mangigi-trust-04b7e890-40d6-4508-a362-ddf-4d2a91906/>

Group Code: TRUST

Check-in: Oct 19,2022

Check-out: Oct 21,2022

Hotel Name: Hilton Garden Inn Manhattan

Hotel Address: 410 South 3rd Street

Manhattan, KS 66502

Hotel Phone Number: 785-532-9116

2022 KBA TRUST CONFERENCE

DAY ONE



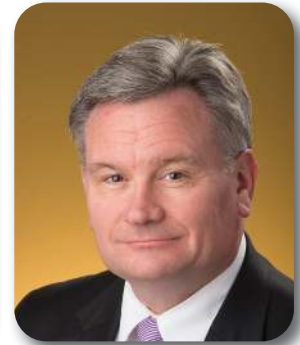
Michael Stillitano
JP Morgan



Matt Jones
Motivational &
Keynote Speaker



Matt Hoy
Stevens & Brand



Dr. Roger Tutterow
Kennesaw State
University

DAY TWO



Bill Ehling
Federated Hermes



Linda Duessel
Federated Hermes



Larry Divers
Cannon Financial

2021-2022 KBA TRUST DIVISION BOARD OF DIRECTORS:

Brian Dutton

President
Community National Bank & Trust, Winfield

Lori Bone

Vice President
Fidelity State Bank & Trust Company, Dodge City

Joe Karnes

Past President & Legislative Rep.
Central National Bank, Lawrence

Tasha Bucher

The Trust Company of Kansas, Arkansas City

Chris English

President Elect
The Trust Company of Kansas, Lawrence

Susie Roberts

Immediate Past President & MOKAN Treasurer
Bank of Labor, Kansas City

Mark Kennedy

Citizens State Bank & Trust Co., Ellsworth

Sherri Gormley

First National Bank of Hutchinson, Hutchinson

KBA STAFF:

Brenda L. Unruh

SVP & Director of Education & Conferences, Member Services

LeAnn Mott

AVP of Education & Conferences, Division Coordinator

2022 KBA TRUST CONFERENCE

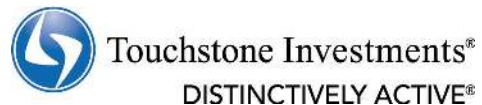
PLATINUM



GOLD



SILVER



BRONZE



THANK YOU!



Trust Division

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2022 KBA TRUST CONFERENCE

October 20-21 - Hilton Garden Inn, Manhattan

410 S. 3rd St. - (785) 532-9116

Early bird registrations postmarked
on or before October 13, 2022.

___ KBA Trust Division Members	\$200
___ KBA Members	\$300
___ Non Members	\$600

Registrations postmarked
after October 13, 2022.

\$250
\$350
\$650

- Fee includes instruction and electronic access to most materials after the conference.
- There will be a conference link sent out a few days prior to the conference.
- We understand that circumstances arise requiring cancellation, if you cancel by 10/13/22, your registration fee will be refunded.
- Substitutions are allowed with advance notice.

Name: _____

Bank Location: _____ E-mail: _____

Name: _____

Bank Location: _____ E-mail: _____

Bank: _____ Total Attending: _____

Attn: _____ Total Enclosed: \$ _____

Address: _____

City: _____ State: _____ Zip: _____

Three ways to register:

1. Complete and mail registration form with payment.
2. Fax registration form, followed by mailing of payment. Please use this form as your invoice.
3. Register Online using a credit card at www.ksbankers.com

Hotel Information: Hotel reservations can be made with the Hilton Garden Inn, Manhattan by calling 785-532-9116 and asking for the KBA Trust Conference group rate. The address is 410 S 3rd, Manhattan, KS 66502.

The room block expires on Friday, September 23, 2022.

Kansas Bankers Association | ATTN: LeAnn Mott | PO Box 4407, Topeka, KS 66604 |

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