

2023

KBA TRUST CONFERENCE



Trust Division

A DIVISION of KBA

October 19-20, 2023

DoubleTree by Hilton Hotel, Lawrence



2023 KBA TRUST CONFERENCE

Thursday, October 19

- 9:30 a.m.** **All Day Refreshments**
Sponsored by: Sunflower Bank
- 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**
Chris English, KBA Trust Division President; Mark Schifferdecker, KBA Chairman
- 11:00 - 12:00 p.m.** **Economic and Market Outlook**
John Tousley, CFA, Goldman Sachs
Sponsored by: Goldman Sachs
Join John Tousley, Head of Goldman Sachs Asset Management Global Market Strategy Team, for a timely economic and market outlook. John will focus on today's macro and market dynamics that are helping shape investors approach to navigating portfolios.
- 12:00 - 1:00 p.m.** **Lunch and Tradeshow**
Sponsored by: Infovisa
- 1:00 - 2:00 p.m.** **Transfer of Wealth & Tax Strategies**
Brenda Benning, CPA, FORVIS; Mitch Caddell, CPA, FORVIS
The presentation will cover wealth transfer issues between generations as well as tax strategies including charitable contributions strategies, utilization of various trust vehicles and inherited IRAs.
- 2:00 - 2:30 p.m.** **Introduction of Business Partners/Refreshment Break**
- 2:30 - 3:30 p.m.** **The Guide to Retirement**
Sponsored by: J.P. Morgan Asset Management
Mike Conrath, CFP, CPRC, J.P. Morgan Asset Management
As people live longer, market forces change and the retirement landscape shifts, planning for a successful retirement increasingly has become more complex. The role of a financial advisor has never been more important to help their clients navigate these challenges and keep them on a path to achieving their retirement goals. Now in its 11th year of publication, J.P. Morgan's Guide to Retirement has been the go-to resource for financial professionals to help simplify complex topics and retirement-led conversations. Please join Michael Conrath – Chief Retirement Strategist for J.P. Morgan Asset Management – as he provides a timely update using the latest slides from the Guide to Retirement to help simplify current themes impacting investors including: SECURE 2.0, emergency reserves, inflation and tax-advantaged accounts.
- 3:30 - 3:45 p.m.** **Refreshment Break**
Sponsored by: First Bankers' Banc Securities & J.P. Morgan Asset Management
- 3:45 - 4:45 p.m.** **Retirement Reimagined**
Sponsored by: Ascensus
Carrie Horn, QKA, QPA, TGPC, Ascensus
This presentation provides financial professionals with an overview of the SECURE 2.0 Act, found within the \$1.7 trillion Consolidated Appropriations Act of 2023. This is possibly the most comprehensive retirement-related legislation since the Employee Retirement Income Security Act of 1974 was enacted. The 90-plus retirement provisions in this act will likely affect nearly anyone who works—even peripherally—with IRAs, qualified retirement plans, or other health and welfare plans.
- 4:45 - 5:15 p.m.** **KBA Trust Division Annual Meeting**
- 5:15 - 6:15 p.m.** **Reception**
Sponsored by: Federated Hermes

Friday, October 20

7:00 - 7:45 a.m.

Buffet Breakfast/Exhibits Open

Beverages sponsored by: Peoples Company

7:45 - 8:45 a.m.

Federated Hermes Fixed Income Market Outlook

Jerry Conner, CFA, Federated Hermes

In this session, Jerry Conner will provide a general economic and credit market outlook, an update on Fed Policy, and an outlook commentary on the duration and curve of market rates.

8:45 - 9:45 a.m.

Ethical Considerations When Multiple Professionals Serve a Mutual Client

Stewart Weaver, Foulston Siefkin LLP

Stewart will address the ethical considerations when an estate-planning-related discipline requires knowledge and expertise from other disciplines to serve a client properly. Included in his discussion are the legal, accounting, financial, psychological, and sociological disciplines.

9:45 - 10:00 a.m.

Refreshment Break

Sponsored by: Columbia Threadneedle Investments

10:00 - 11:00 a.m.

Human Connection in a Digital World

Curtis Waltermire

Sponsored by: Proxytrust

The most successful businesses find a proper balance of creating and maintaining human connection while at the same time making the most of the digital assets available to them. The digital assets we use help us better serve the needs of our clients but also lead us to become increasingly disconnected with other in genuine ways. In this presentation, Curtis talks about why we easily become disconnected and how we can avoid falling into this trap through connecting with people in fun and creative ways.

11:00 - 12:00 p.m.

Ethical Obligations of Tax Practitioners: Understanding the Rules to Protect Yourself and Your Clients

Stephen Mazza, J.D., LL.M, University of Kansas School of Law

Drawing the line between permissible tax avoidance and impermissible tax evasion is difficult. Practitioners and clients who cross the line may be subject to a wide array of penalties imposed by the Internal Revenue Code, the Treasury Department, and organizations that regulate practitioners' ethical behavior. This presentation will explore the different governing standards that apply at the taxpayer and tax practitioner level and highlight some of the inconsistencies that may create conflicts between advisors and clients.

12:00 p.m.

Conference Adjourns

CONFERENCE INFO

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 widely. It is recommended that you bring a sweater or jacket to the sessions. If you should have any questions, please contact J.W. Wells via email, jwells@ksbankers.com, or at the KBA office (785)-232-3444. Nametags and lanyards required for all events.

DOUBLETREE BY HILTON, LAWRENCE ROOM BLOCK DETAILS:

Hotel reservations can be made with the DoubleTree by Hilton, Lawrence by calling 785-841-7077 and asking for the KBA Trust Conference group rate. The address is 200 McDonald Dr., Lawrence, KS 66044. The room block expires on 9/20/23. Guests will have until 11:59 p.m. on the 20th to book reservations under the discounted rate. The rate is \$109 without breakfast.

2023 KBA TRUST CONFERENCE

KBA TRUST DIVISION BOARD OF DIRECTORS

Chris English, President

The Trust Company of Kansas, Lawrence

Mark Kennedy, Vice President

Citizens State Bank & Trust Company, Ellsworth

Susie Roberts, Past President

Bank of Labor, Kansas City

Sherri Gormley

First National Bank of Hutchinson, Hutchinson

Amy Barber

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Lori Bone, President-Elect

Fidelity State Bank & Trust Company, Dodge City

Brian Dutton, Immediate Past President & MOKAN Treasurer

Community National Bank & Trust, Winfield

Joe Karnes, Legislative Rep.

Central National Bank, Lawrence

Tasha Bucher

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Grant Paitz,

INTRUST Bank, N.A., Wichita

KBA STAFF

Brenda L. Unruh

SVP - Director of Education & Conferences, Strategic Partnerships

J.W. Wells

Ag and Trust Division Manager

LeAnn Mott

VP - Education & Conferences

DAY ONE



Chris English
KBA Trust Division
President



Mark Schifferdecker
KBA Chairman



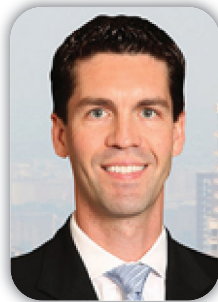
John Tousley
CFA, Goldman Sachs



Brenda Benning
CPA, FORVIS



Mitch Caddell
CPA, FORVIS



Mike Conrath
CFP, CPRC, J.P. Morgan
Asset Management



Carrie Horn
QKA, QPA, TGPC,
Ascensus

DAY TWO



Jerry Conner
CFA, Federated Hermes



Stewart Weaver
Foulston Siefkin LLP



Curtis Waltermire



Stephen Mazza
J.D., LL.M.,
University of Kansas
School of Law

2023 KBA TRUST CONFERENCE SPONSORS

PREMIER



KBA Insurance, Inc.

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THANK YOU!



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October 19-20, 2023 - DoubleTree by Hilton, Lawrence
200 McDonald Dr. - (785) 841-7077

Early bird registrations postmarked
on or before October 12, 2023.

Registrations postmarked
after October 12, 2023.

___ KBA Trust Division Members	\$200	\$250
___ KBA Members	\$300	\$350
___ Non Members	\$600	\$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 10/12/23, 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. Email registration form to jwells@ksbankers.com, followed by mailing of payment to the KBA office.
Please use this form as your invoice.
3. Register Online using a credit card at www.ksbankers.com

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Kansas Bankers Association | ATTN: J.W. Wells | PO Box 4407, Topeka, KS 66604 |
P: (785) 232-3444 | F: (785) 272-8392 | www.ksbankers.com