

2024

KBA TRUST CONFERENCE



Trust Division

A DIVISION of KBA

October 24-25, 2024

Wichita Marriott, Wichita, KS



2024 KBA TRUST CONFERENCE

Thursday, October 24

- 10:00 - 10:45 a.m.** **Registration**
- 10:00 - 3:30 p.m.** **Sponsor Tradeshow Open**
- 10:45 - 11:00 a.m.** **Welcome and Announcements**
Lori Bone, KBA Trust Division President
- 11:00 - 12:00 p.m.** **On the Economic, Business and Political Climate**
Dr. Roger Tutterow, Kennesaw State University
In this session, Dr. Roger Tutterow provides a timely overview of activity in the national and regional economies including discussion of the role of supply chain disruptions on the construction and retail sectors, the long-term effect of COVID-19 on labor markets and real estate, the connection between fiscal stimulus, monetary policy and the recent surge in inflation, policy responses by the Federal Reserve and effects of changes in competitive landscape on performance in the public and private sectors.
- 12:00 - 1:00 p.m.** **Lunch and Sponsor Tradeshow**
Sponsored by: Infovisa
- 1:00 - 2:00 p.m.** **Culture is Key**
Jeff Kropschot, Kropschot Consulting Partners, LLC
During this session, we will explore key elements of a strong culture of compliance, as well as the compliance, operational, reputational and other benefits enjoyed by organizations who maintain a strong compliance culture. We will also share illustrative examples of companies and individuals who have embraced and not embraced these essential principles.
- 2:00 - 2:30 p.m.** **Introduction of Business Partners & Break**
Sponsored by: First Bankers' Banc Securities and J.P. Morgan
- 2:30 - 3:30 p.m.** **Make Politics Boring Again**
Linda Duessel, Federated Hermes
This presentation explores the set up to the presidential election, where opinions about Biden and Trump are set in stone. Independent voters and a handful of swing states will likely determine the outcome, but historical precedent is clear that the incumbent's chances rest on the state of the economy and voter's pocketbooks. Congressional races are so boring, but most important for the country's future path. Politics may never be boring again.
- 3:30 - 3:45 p.m.** **Refreshment Break**
Sponsored by: Fifth Third Institutional Services
- 3:45 - 4:45 p.m.** **Conflicted**
Jeff Kropschot, Kropschot Consulting Partners, LLC
In this session, we will explore examples of traditional and emerging conflict of interest and self-dealing scenarios that arise in the delivery of fiduciary services. We will also discuss the risks and liabilities related to these scenarios, as well as permissive exceptions to the duty of loyalty that may allow a fiduciary to legally engage in conflict of interest and self-dealing activities. Finally, we will discuss actual conflict of interest and self-dealing examples, as seen through the eyes of a former examiner and chief compliance officer.
- 4:45 - 5:15 p.m.** **KBA Trust Division Annual Meeting**
- 5:15 - 6:15 p.m.** **Reception**
Sponsored by: Federated Hermes

Friday, October 25

7:00 - 7:45 a.m.

Buffet Breakfast/Sponsor Tradeshow Open

Buffet Breakfast sponsored by: KBA Insurance, Inc.

7:45 - 8:45 a.m.

Fixed Income for All Landing Scenarios in 2024

Austin Stockfisch, First Trust Advisors

Two years have passed since the Fed's first interest rate hike of this cycle, and roughly eight months have passed since the Fed's last rate hike. While interest rates have indeed remained higher for longer, interest rate volatility has declined as the Fed has shifted from an "increasing rate regime" to a "peak rate regime". Austin will sift through the fixed income markets, highlighting current risks and opportunities.

The Times They Are A-Changin'

Noah Helm, First Trust Advisors

Growth crushed value. Technology crushed everything. COVID-19 and government intervention had huge implications for markets. So, where do we go from here? Investors who stay focused on fundamentals can minimize risk and avoid emotional decisions. This matters more than ever. Listen as Noah shares First Trust's view on where markets may be headed from here.

8:45 - 9:45 a.m.

Creating Team Engagement and Connection: Transforming Organizational Culture with the L.E.A.D. Operating System

Neil & Caleb Stevens, SouthState Bank

With employee engagement at critical lows, as highlighted by recent Gallup findings, the need for effective, actionable solutions has never been greater. In this talk, the Stevens duo will introduce the L.E.A.D. Operating System—a groundbreaking approach designed to revolutionize your workplace culture. They will provide proven strategies to dramatically reduce turnover, increase retention, enhance sales, and boost profitability.

9:45 - 10:00 a.m.

Refreshment Break

10:00 - 11:00 a.m.

Top Retirement Plan Issues for 2024 for the Baby Boomer Generation and Eight Retirement Distribution Strategies that Will Make Their Money Last

Larry Divers, Cannon Financial

This presentation will address specific ways in which individuals and households can create a lifetime income stream that the individual and spouse cannot outlive. It will also cover how to distribute the remaining assets to their beneficiaries in the most tax sensitive manner.

11:00 - 12:00 p.m.

Retirement Update: SECURE 2.0 and Required Minimum Distribution Rates

Larry Divers, Cannon Financial

This presentation will include discussion on: Individual Retirement Accounts, including Traditional, Sep, and SIMPLE, 401K, 403(b), 457(b) Plans, required minimum distribution aggregation rules to each type of account, strategies for lowering required minimum distributions to include, qualified distributions, Roth conversions, qualified charitable distributions, net unrealized appreciation on company stock.

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 LeAnn Mott via email at lmott@ksbankers.com, or at the KBA office (785) 232-3444. Nametags and lanyards required for all events.

WICHITA MARRIOTT HOTEL ROOM BLOCK DETAILS:

Hotel reservations can be made by clicking on the link below or by calling the hotel at 316.651.0333. Room block expires on Wednesday, October 2, 2024.

<https://www.marriott.com/event-reservations/reservation-link.mi?id=1718229854413&key=GRP&app=resvlink>

2024 KBA TRUST CONFERENCE

KBA TRUST DIVISION BOARD OF DIRECTORS

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Fidelity State Bank & Trust Co., Dodge City

Tasha Bucher, Vice President

The Trust Company of Kansas, Arkansas City

Brian Dutton, Past President

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Debbie Newman, Director

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KBA STAFF

Brenda L. Unruh

SVP - Director of Education & Conferences, Strategic Partnerships

Kelly VanZwoll, JD

VP - Government Relations/Staff Attorney

LeAnn Mott

VP - Education & Conferences

DAY ONE



Dr. Roger Tutterow
Kennesaw State
University



Jeff Kropschot
Kropschot Consulting
Partners, LLC



Linda Duessel
Federated Hermes

DAY TWO



Austin Stockfisch
First Trust Advisors



Noah Helm
First Trust Advisors



Neil Stevens
Oconee State Bank



Caleb Stevens
SouthState Bank



Larry Divers
Cannon Financial

2024 KBA TRUST CONFERENCE SPONSORS

PREMIER



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First Trust

THANK YOU!



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October 24-25, 2024 - Wichita Marriott, Wichita, KS

9100 E Corporate Hills Dr. - (316) 651-0333

Early bird registrations postmarked
on or before October 18, 2024.

Registrations postmarked
after October 18, 2024.

___ 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 10/18/24, 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: _____

Two ways to register:

1. Complete and mail registration form with payment. Please use this form as your invoice.
2. Register online using a credit card at: www.ksbankers.com

Hotel Information: Hotel reservations can be made by clicking on the link below or by calling the hotel at 316.651.0333. Room block expires on Wednesday, October 2, 2024.

<https://www.marriott.com/event-reservations/reservation-link.mi?id=1718229854413&key=GRP&app=resvlink>

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