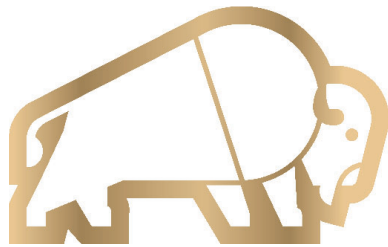


## FEBRUARY 27, 2025 - VIRTUAL

Kansas bankers are frequently required to complete transactions for customers who have created revocable and irrevocable trusts. To protect your bank's interests when using these documents, it is imperative to understand the basic do's and don'ts. This presentation will provide best practices for dealing with these complex legal documents, including establishing the relationship, changing titles, and performing loan and deposit transactions. The session will also cover what happens when the trust co-owns an account with another trust or person. This webinar will provide detailed information about Kansas trust law.

### WHO SHOULD ATTEND:

Bank employees involved with opening new accounts, deposit or loan documentation, and operations, as well as bank attorneys, will find this webinar very useful.



### TOPICS INCLUDE:

- Revocable vs. irrevocable trusts
- Living trust vs. testamentary trust
- Issues when there are co-trustees for the trust
- When a successor trustee can do business for the trust
- Relationship between Power of Attorney and trust documents
- Trusts as safe deposit box holders



Program Presenter

**TERRI D. THOMAS, JD**  
**EVP/COO, KANSAS BANKERS ASSOCIATION**

With over 40 years of banking experience, Terri brings real world instruction delivered in an upbeat and relaxed style.

**DEMYSTIFYING TRUSTS: A GUIDE TO ESTABLISHING DEPOSIT ACCOUNTS  
AND LOANS FOR KANSAS BANKERS  
FEBRUARY 27, 2025 - VIRTUAL**



**Program Agenda**

Program: 2:00 p.m. - 4:00 p.m.

**Registration Information**

<b>ASSET SIZE</b>	<b>LIVE</b>	<b>ONDEMAND</b>	<b>BOTH</b>
\$25 mil & under	___ \$150	___ \$200	___ \$250
\$26 mil - \$100 mil	___ \$250	___ \$300	___ \$350
\$101 mil - \$250 mil	___ \$350	___ \$400	___ \$450
\$251 mil - \$400 mil	___ \$450	___ \$500	___ \$550
\$401 mil - \$750 mil	___ \$550	___ \$600	___ \$650
\$751 mil - \$1 bil	___ \$650	___ \$700	___ \$750
Over \$1 billion	___ \$750	___ \$800	___ \$850
Assoc. Members	___ \$550	___ \$600	___ \$650
Non-members	___ \$1,500	___ \$1,600	___ \$1,700

\*Fee includes instruction, electronic manual via secured link and power point handout.

\*We understand circumstances arise requiring cancellation. Once you receive the electronic confirmation and materials, there will be no refunds. There is no limit to the number of employees that can attend the virtual session from your institution. Please register using the COMPANY login ID and password when registering more than one individual. If you have more than one attending, please email Natalie Wareham at [nwareham@ksbankers.com](mailto:nwareham@ksbankers.com). No video or audio recording allowed.

Registrant name - \_\_\_\_\_ Job title - \_\_\_\_\_

Bank Location - \_\_\_\_\_ E-mail - \_\_\_\_\_

Registrant name - \_\_\_\_\_ Job title - \_\_\_\_\_

Bank Location - \_\_\_\_\_ E-mail - \_\_\_\_\_

Registrant name - \_\_\_\_\_ Job title - \_\_\_\_\_

Bank Location - \_\_\_\_\_ E-mail - \_\_\_\_\_

Bank - \_\_\_\_\_ Total Attending - \_\_\_\_\_

PO Box - \_\_\_\_\_ Total Enclosed - \_\_\_\_\_

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 at [www.ksbankers.com](http://www.ksbankers.com).**