



## ONDEMAND

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.

### Pricing for OnDemand:

- \_\_\_ \$25 mil & under: \$200
- \_\_\_ \$26 mil to \$100 mil: \$300
- \_\_\_ \$101 mil to \$250 mil: \$400
- \_\_\_ \$251 mil to \$400 mil: \$500
- \_\_\_ \$401 mil to \$750 mil: \$600
- \_\_\_ \$751 mil to \$1 bil: \$700
- \_\_\_ Over \$1 billion: \$800
- \_\_\_ Associate Member: \$600
- \_\_\_ Non-Member: \$1,600

Please email completed form to Natalie Wareham at [education@ksbankers.com](mailto:education@ksbankers.com) or fax to 785-272-8392.

Name: \_\_\_\_\_

Bank: \_\_\_\_\_

Address: \_\_\_\_\_

State, Zip: \_\_\_\_\_

Email: \_\_\_\_\_

### 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.