

2025 KBA TRUST CONFERENCE

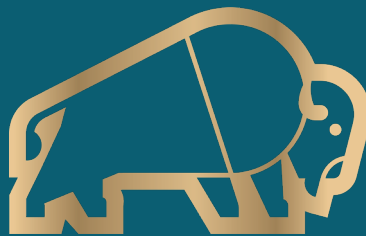


Trust Division

A DIVISION of KBA

October 23-24, 2025

Hilton Garden Inn, Manhattan, KS



2025 KBA TRUST CONFERENCE

Thursday, October 23

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

Mark Kennedy, KBA Trust Division President

Julie Hower, Chair of KBA Board

11:00 - 12:00 p.m. **Maximizing Retirement Savings with SECURE 2.0: Strategic Financial Planning, Tax Implications, and Practical Applications**

Larry Divers, Cannon Financial

Join us for an engaging and informative session on how to leverage the SECURE 2.0 Act's catch-up provisions to enhance your clients' retirement savings. This talk will cover three critical areas: strategic financial planning, tax implications, and practical applications.

12:00 - 1:00 p.m. Lunch and Sponsor Tradeshow

SPONSORED BY: INFOVISA

1:00 - 2:00 p.m. **Opening Up Private Markets: A Revolutionary Shift for Asset Managers and Trust Investors**

Larry Divers, Cannon Financial

This session will focus on how the democratization of private markets is revolutionizing the investment landscape for trust investors and asset managers. We will explore historical content, evolution of the investor landscape, accessibility enhancements, and the impact on asset and wealth managers.

2:00 - 2:30 p.m. Introduction of Business Partners & Refreshment Break

2:30 - 3:30 p.m. **Hot Fiduciary Compliance Topics for Trustees**

Patrick Alyward, TRUSTWorthy Consultants

Fiduciary compliance requirements continue to change and evolve. Join this informative session to learn about some recent compliance developments that impact trustees on a daily basis. Some best practices will be shared along with some potholes to watch out for. Whether you are a Trust Officer, Compliance team member, or management, this session will get you up to speed!

3:30 - 3:45 p.m. Refreshment Break

3:45 - 4:45 p.m. **Economic and Market Outlook**

John Tousley, CFA, 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.

4:45 - 5:15 p.m. KBA Trust Division Annual Meeting

5:15 - 6:15 p.m. Reception

SPONSORED BY: FEDERATED HERMES

Friday, October 24

7:30 - 8:25 a.m.

Buffet Breakfast/Sponsor Tradeshow Open

8:30 - 9:30 a.m.

The Children of the Revolution: Digital Revolution, Millennials and a Secular Bull Market
Steve Chiavarone, Federated Hermes

Steve Chiavarone presents an analysis of the industrial revolution underway, including its economic and social impacts. He also considers the added importance of the millennial generation – the largest cohort in US history – and their impact on the rapidly evolving topic. In conclusion, Steve will tie these two major catalysts together in his case for a continued secular bull market.

9:30 - 9:45 a.m.

Refreshment Break

9:45 - 10:45 a.m.

The Richest Man in Town
V.J. Smith, Author

This is V.J.'s signature talk and is based on the best-selling book of the same title. Audience members will go on an emotional roller coaster ride as V.J. describes how Marty, an unforgettable cashier at a local big box store, had a profound impact on the people who went through his check-out line. Marty became a legend in an unexpected place because he treated everybody with dignity, kindness and respect. As V.J. says, "Marty was living proof that you don't need money, power or title to make a difference in life. You just need to care."

10:45 - 11:00 a.m.

Refreshment Break

11:00 - 12:00 p.m.

Elevate Your Conversations with the 2025 Guide to Retirement
Michael Conrath, J.P. Morgan Asset Management

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: 7 Kansas CLE Credits Available.

ABA Professional Credits Available.

Suggested Attire: The suggested attire for this year's conference is business casual. Nametags and lanyards are required during the conference. If you should have any questions, please contact LeAnn Mott via email at lmott@ksbankers.com, or at the KBA office (785) 232-3444.

Hotel information is listed on the registration form.

2025 KBA TRUST CONFERENCE

KBA TRUST DIVISION BOARD OF DIRECTORS

Mark Kennedy, President

Citizens State Bank & Trust Company, Ellsworth

Amy Barber, Vice President

Central National Bank, Topeka

Chris English, Past President

The Trust Company of Kansas, Lawrence

Grant Paitz, Director

INSTRUST Bank, N.A., Wichita

Debbie Newman, Director

Southwest National Bank, Wichita

Joe Karnes, Legislative Rep.

Central National Bank, Lawrence

Tasha Bucher, President-Elect

The Trust Company of Kansas, Arkansas City

Lori Bone, Immediate Past President & MOKAN Treasurer

Fidelity State Bank & Trust Co., Dodge City

Sherri Gormley, Director

First National Bank of Hutchinson, Hutchinson

Chris Kuckelman, Director

Midwest Trust Company, Overland Park

Jeff Wacker, Director

Advantage Trust Company, Salina

KBA STAFF

Brenda L. Unruh

EVP - Education & Conferences, Strategic Partnerships

Kelly VanZwoll, JD

SVP - Government Relations/Staff Attorney

LeAnn Mott

VP - Education & Conferences

DAY ONE



Larry Divers
Cannon Financial



Patrick Alyward
TRUSTWorthy
Consultants



John Tousley, CFA
Goldman Sachs

DAY TWO



Steve Chiavarone
Federated Hermes



V.J. Smith
Author



Michael Conrath
J.P. Morgan
Asset Management

2025 KBA TRUST CONFERENCE SPONSORS

PREMIER



BlueCross BlueShield
Kansas



KBA Insurance, Inc.
A SUBSIDIARY of KBA

PLATINUM

**Federated
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GOLD



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Sachs**

BRONZE

 **First Trust**

 **FIRST NATIONAL BANK**

J.P.Morgan
Asset Management

COHEN & STEERS

 **Fifth Third**
Institutional Services

FBBS
FIRST BANKERS' BANC SECURITIES, INC.

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THANK YOU!

2025 KBA TRUST CONFERENCE

October 23-24, 2025 - Hilton Garden Inn, Manhattan, KS
410 S 3rd St, Manhattan, KS 66502 - (785) 532-9116



Trust Division

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	<u>Early bird registrations postmarked on or before October 16, 2025.</u>	<u>Registrations postmarked after October 16, 2025.</u>
☐ KBA Trust Division Members	\$225	\$275
☐ KBA Members	\$325	\$375
☐ Non Members	\$625	\$675

- Fee includes instruction and electronic access to most materials after the conference.
- We understand that circumstances arise requiring cancellation, if you cancel by 10/16/25, your registration fee will be refunded. Substitutions are allowed with advance notice.

Registrant Name: _____

Title: _____

Bank or Company: _____

Address: _____ City, ST, Zip: _____

Phone: _____ E-mail: _____

Registrant Name: _____

Title: _____

Bank or Company: _____

Address: _____ City, ST, Zip: _____

Phone: _____ E-mail: _____

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

ACT FAST!

TO RESERVE YOUR KBA TRUST CONFERENCE HOTEL ROOM: [CLICK HERE!](#)

The special room rate is available until September 27, 2025, or until the room block is sold out- whichever comes first.

Hotel Name: Hilton Garden Inn Manhattan

Hotel Address: 410 South 3rd Street, Manhattan, KS 66502

Phone Number: 785-532-9116

RESERVATION GUIDELINES:

A credit card is required for guest room reservations.

Cancellations within 48 hours of arrival will incur a charge for the first night's Room/Tax.

Check-in: 3 PM

Check out: 12 PM

Early arrivals are accommodated based on availability.

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

P: (785) 232-3444 | F: (785) 272-8392 | www.ksbankers.com