

2025 ANNUAL REPORT



Trust Division

A DIVISION of KBA

Presented by the 2024-2025

KBA Trust Division Board of Directors

It has been my honor to serve as President of the KBA Trust Division Board over the past year. The challenge of this role isn't the added meetings or time away from the office but rather fulfilling the standard set by those who served before me and honoring the expectations of those who will follow in the years ahead.

The trust industry in Kansas is elite. Not only do we have extremely knowledgeable and dedicated trust professionals serving clients across the state and nation, but we have one of the finest Government Relations teams helping us with policy in Topeka and Washington DC. When the KBA GR team goes to the statehouse or Capitol Hill, lawmakers listen.

The 46th annual MOKAN Trust Conference in May was a tremendous success. Conducted in partnership with the Missouri Bankers Association, we have grown this conference and established it as one of the premier trust conferences in the nation. The 2025 KBA Trust Conference in Manhattan again brought together trust professionals from across the state to network and learn from a great group of speakers.

A big thank you to the KBA staff for their work on the day-to-day operations of the Division. Their knowledge and attention to detail is what keeps everything running smoothly. I look forward to working with our incoming President, Tasha Bucher, as she takes over the helm of the Division. Under Tasha's leadership, I have no doubt that 2026 will be yet another successful year!

Thank you,

Mark Kennedy

Citizens State Bank & Trust Co., Ellsworth



2025 MOKAN CONFERENCE RECAP

The 46th MOKAN Trust and Financial Services Conference took place from May 14-16 at the Sheraton Overland Park Hotel and Convention Center. There were over 300 attendees and 35 sponsors!

Sam Donaldson, Professor of Law at Georgia State University, kicked off the conference with sessions on recent developments in federal income taxes and federal wealth transfer taxes. Sam is not only informative but entertaining and a crowd favorite! Day 1 breakout sessions included topics on ethical hazards for trust officers, trust organizations and investments as well as special needs trusts.



Mark Kennedy, Vice President and Trust Officer at Citizens State Bank & Trust Co. in Ellsworth, welcomed attendees to Day 2 of the conference.



Day 1 marked the start of three days filled with high-impact sessions, top-tier speakers and invaluable networking for trust and financial services professionals across the region.

Linda Duessel, Senior Equity Strategist with Federated Hermes, opened Day 2 with an economic and market outlook, followed by Jeff Levine, Chief Planning Officer with Buckingham Wealth Partners, who presented on untangling IRA regulations and then trust IRA beneficiaries. All three sessions were timely and valuable. Day 2's break sessions covered behavioral finance, estate planning pitfalls and estate planning considerations.

Day 3 featured Amy Floria, CEO of Corgenius, who spoke on how to be the best

advisor in your client's worst times, followed by Michael Dixon, Director at Pohl Consulting, who presented on the topic of maximizing business opportunities with your current clients. Finally, Mitch Holthus, "The Voice of the Kansas City Chiefs," gave an unforgettable presentation on power from unexpected sources.



Mitch Holthus, Voice of the Kansas City Chiefs, closed out the conference with powerful leadership takeaways from the Chiefs' winning culture, reminding us that success often comes from unexpected sources.

Thanks to all of the speakers and sponsors for making the 2025 MOKAN Trust and Financial Services Conference a success!

Please mark your calendar for next year: May 6-8, 2026, at the Sheraton Overland Park Hotel and Convention Center. See you there!

2025 KBA TRUST CONFERENCE

The KBA Trust Division hosted its annual Trust Conference October 23-24 at the Hilton Garden Inn in Manhattan. This conference provides attendees with valuable, up-to-date insights on the latest trends and advancements in trust and estate management, equipping them with practical tools and knowledge.

Maximizing Retirement Savings with SECURE 2.0: Strategic Financial Planning, Tax Implications, and Practical Applications & Opening Up Private Markets: A Revolutionary Shift for Asset Managers and Trust Investors - Larry Divers, Cannon Financial

Larry Divers of Cannon Financial kicked off the conference with practical strategies to help clients make the most of the SECURE 2.0 Act. Attendees explored how new catch-up provisions can enhance retirement planning through smart financial, tax, and implementation decisions.

In his second session, Larry Divers examined how the democratization of private markets is reshaping opportunities for asset managers and trust investors. The discussion highlighted trends expanding access and transforming traditional investment landscapes.

Hot Fiduciary Compliance Topics for Trustees - Patrick Alyward, TRUSTWorthy Consultants

Patrick Alyward of TRUSTWorthy Consultants covered evolving fiduciary compliance expectations, recent regulatory changes, and best practices for trust officers to avoid common pitfalls and maintain strong oversight.



Mark Kennedy, of Citizens State Bank & Trust Co., Ellsworth, was recognized for his outstanding service as President of the KBA Trust Division. Tasha Bucher, of The Trust Company of Kansas, Arkansas City, will serve as the incoming President. Thank you, Mark, for your leadership and commitment to the Trust Division!

bestselling book, sharing the unforgettable story of "Marty," a humble cashier whose kindness and respect for others left a lasting mark—reminding attendees that anyone can make a difference.

Guide to Retirement - Michael Conrath, J.P. Morgan Asset Management

Michael Conrath of J.P. Morgan Asset Management closed the conference with actionable insights from the Guide to Retirement. His engaging visuals and data-driven advice helped attendees strengthen client conversations around longevity, volatility, and tax-efficient planning.



Bankers attending the Trust Conference at the Hilton Garden Inn in Manhattan.

SAVE THE DATES

2026 MOKAN TRUST & FINANCIAL SERVICES CONFERENCE

May 6-8, 2026

*Sheraton Overland Park Hotel & Convention Center
Overland Park, KS*

2025 KBA Trust Division Board

Mark Kennedy

President
Citizens State Bank & Trust Company, Ellsworth

Tasha Bucher

President Elect
The Trust Company of Kansas, Arkansas City

Amy Barber

Vice President
Central National Bank, Topeka

Lori Bone

Immediate Past President & MOKAN Treasurer
Fidelity State Bank & Trust Company, Dodge City

Chris English

Past President
The Trust Company of Kansas, Lawrence

Sherri Gormley

Director
First National Bank of Hutchinson, Hutchinson

LeAnn Mott

KBA Staff
Kansas Bankers Association, Topeka

Grant Paitz

Director
INTRUST Bank, N.A., Wichita

Chris Kuckelman

Director
Midwest Trust Company, Overland Park

Debbie Newman

Director
Southwest National Bank, Wichita

Jeff Wacker

Director
Advantage Trust Company, Salina

Joe Karnes

Legislative Representative
Central National Bank, Lawrence

Brenda L. Unruh

KBA Staff
Kansas Bankers Association, Topeka

Kelly VanZwoll, J.D.

KBA Staff
Kansas Bankers Association



Back row is Jeff Wacker, Chris Kuckelman, Chris English, Mark Kennedy, Grant Paitz.
Front row is Amy Barber, Debbie Newman, Sherri Gormley, Tasha Bucher, Lori Bone (not pictured is Joe Karnes).

2026 KBA TRUST CONFERENCE

October 22-23, 2026

DoubleTree
Lawrence, KS