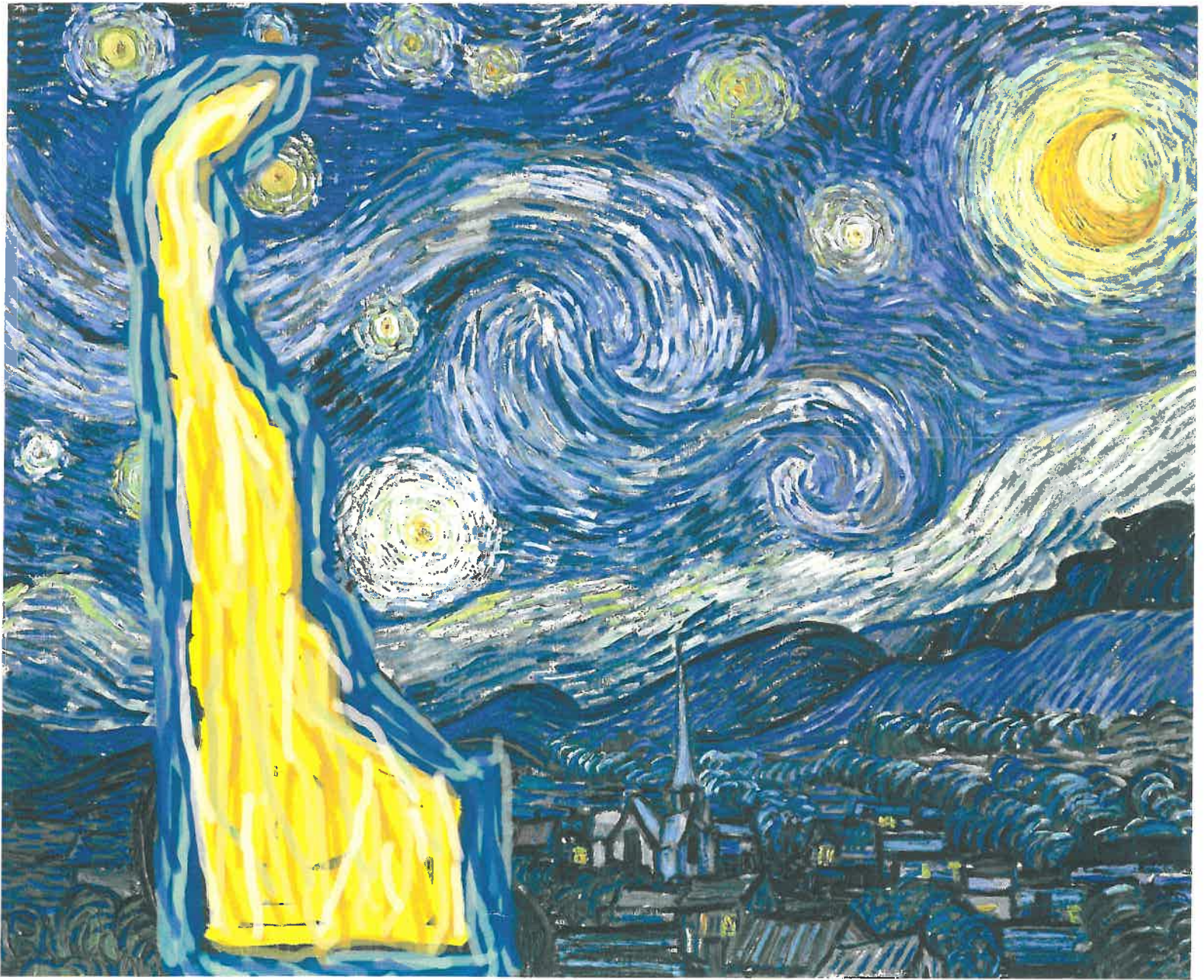


2013 Delaware Trust Conference



The Art of Trusts... Perfected

October 1st & 2nd - Wilmington

2013 Delaware Trust Conference

Effective wealth management and estate planning is truly an art. That art has been perfected in the Delaware trust product. Join a distinguished group of skilled trust artisans for the 2013 Delaware Trust Conference. This year's conference will feature a detailed case study format that will weave throughout the sessions presenting participants with a complete picture of the advantages of Delaware trusts. Over 50 renowned trust, legal and accounting experts will provide "Delaware Exclusive" information in this unique event for trust and wealth management professionals, attorneys, CPAs and others in related fields.

TUESDAY, OCTOBER 1st
7:45 – 9:00 – Registration

8:30 – 10:00 - Panel Discussion - Group Live: PLANNING FOR COMPLEX FAMILIES

An intimate look at the process of working with high net worth families with both domestic and international components spanning family dynamics, businesses, financial assets and existing trusts from the perspective of the attorney and wealth planner.

MODERATOR: Charles J. Durante, Esq., Partner, Connolly Gallagher, LLP

PANELISTS: Dennis I. Belcher, Esq., Partner, McGuireWoods LLP; Julia B. Fisher, Managing Director and Wealth Advisor, J.P. Morgan Private Bank

10:00 – 10:20 - Welcome to Conference and Break

10:20 – 11:50 - Panel Discussion - Group Live: DUE DILIGENCE

A discussion of issues related to the potential tension between the banking industry charged with due diligence and the legal community charged with maintaining confidentiality. Learn about reasonable "know your client" practices from the perspective of attorneys, trust officers and regulators.

MODERATOR: David A. Diamond, Esq., Of Counsel, Gordon Fourmaris & Mammarella, P.A.

PANELISTS: Robert G. Rowe, III, Esq. Vice President & Senior Counsel, Center for Regulatory Compliance American Bankers Association; Seane Baylor, CTFA, Director, UBS Trust Company, N.A.; Karen A. Fahrner, J.D., LL.M., AEP, Vice President, Senior Wealth Planner, PNC Delaware Trust Company

11:50 – 12:15 Break

12:15 – 1:00 Lunch

1:00 – 2:00 - SPEAKER: G. Scott Clemons, CFA, Managing Director, Brown Brothers Harriman - ECONOMIC AND MARKET COMMENTARY

2:00 – 2:15 Break

2:15 – 3:45 Panel Discussion - Group Live: CHOOSING THE RIGHT ADVISOR, TRUSTEE AND TRUST SITUS

A frank discussion about what makes Delaware, Delaware Trustees and Advisors a cut above the rest. To include conversation about what other states are doing to compete and how Delaware has the right combination of laws, sophisticated advisors and infrastructure to provide superior service to clients.

MODERATOR: Julie Min Chayet, Esq., Managing Director, Fiduciary Trust Company International

PANELISTS: Richard W. Nenko, Esq., Managing Director and Trust Counsel, Wilmington Trust Company; Ellisa Opstbaum Habbart, Esq., Founding Partner, Delaware Counsel Group, LLP; Laura A. Zwicker, Esq., Partner, Greenberg Glusker Fields Claman & Machtinger LLP; John M. Olivieri, Esq., Partner, White & Case LLP

3:45 – 4:00 Break

4:00 – 5:30 Panel Discussion - Group Live: TRUST MIGRATION

An analysis of the various means of moving a trust between jurisdictions and making modifications to the governing instrument, to include discussions regarding merger, decanting, trust modification, trust reformation and non-judicial settlements.

MODERATOR: Todd A. Flubacher, Esq., Partner, Morris Nichols, Arshat & Tunnell LLP

PANELISTS: Georgiana J. Slade, Esq., Partner, Milbank, Tweed, Hadley & McCloy LLP; Daniel F. Hayward, Esq., Director, Gordon Fourmaris & Mammarella, P.A.; Rebecca Wallenfelsz, Esq., Partner, Chapman and Cutler LLP

5:30 – 6:15 Reception

6:15 – 7:00 Dinner

7:00 – 8:00 SPEAKER: Robert H. Sitkoff, Esq., John L. Gray Professor of Law, Harvard Law School

Total Credits – Day 1 = 8.0

WEDNESDAY, OCTOBER 2nd

7:45 - 9:00 a.m. - Registration & Continental Breakfast - Hotel du Pont, Gold Ballroom, Foyer

8:30 – 10:00 - Panel Discussion - Group Live: DISCRETIONARY DISTRIBUTIONS

The heart of the trust business is service. Good service, guided by fiduciary responsibility, requires an understanding of trust distribution standards and a willingness to work with unique versions of those standards.

MODERATOR: Michael E. Roberts, JD, LL.M., CFP, EVP, Personal Trust, Reliance Trust Company, President, Reliance Trust Company of Delaware

PANELISTS: Charlotte K. Ray, Managing Director and Fiduciary Executive, JP Morgan Chase Bank, N.A.;

Laura G. Mandel, President, Northern Trust Company of Delaware; Mark A. Oller, AVP & Managing Director, Wilmington Trust Company

WEDNESDAY, OCTOBER 2nd (continued)

10:00 – 10:20 - Break

10:20 – 11:50 - Interactive Split Sessions - Group Live (Select One)

A. ADMINISTRATION OF SPECIAL NEEDS TRUSTS

A practical session detailing how to effectively draft and implement a special needs trust in a perpetual world.

MODERATOR: Kim D. Fetrow, Esq., Partner, Hecksher Teillon Terrill & Sager, P.C.

PANELISTS: Donald Ryan, RN, CCM, CLCP, Vice President, National Care Advisors; Erin Sunday, Vice President, Special Needs Trust Group, Wells Fargo Private Bank; Mandy Stokes, Philadelphia Region Programs Support Team, Social Security Administration

B. THE CURRENT STATE OF SAME SEX MARRIAGE

An update on the current state of same sex marriage and civil union law in Delaware and throughout the nation. How has the process evolved? How does the United States Supreme Court's Windsor decision affect estates and trusts?

MODERATOR: Richard J.A. Popper, Esq., Partner, Young Conaway Stargatt & Taylor, LLP

PANELISTS: Bernard L. McKay, Esq., Member, Frost Brown Todd LLC; F. Peter Conaty, Jr., Esq., Director, Richards Layton & Finger, P.A.; Mark Purpura, Esq., Chairman, Equality Delaware Foundation

C. BENEFICIARY NOTIFICATION CHALLENGES

In light of recent case law, the panel will examine how silent trusts should be structured to satisfy donor intent, ease public policy concerns and relieve fiduciaries of significant long-term liability.

PANELISTS: Jocelyn Margolin Borowsky, Esq., Partner, Duane Morris LLP; Adrienne M. Penta, Esq., Senior Vice President, Brown Brothers Harriman

11:50 – 12:15 Break

12:15 – 1:00 Lunch

1:00 – 2:00 - Balancing Family Dynamics: Every family meeting requires thoughtful planning and a strategic approach on the part of the facilitating advisor. Family complexity demands preparation, a safe meeting space and self-mastery.

LUNCHEON SPEAKERS: Daisy Medici, Managing Director of Governance and Education, GenSpring Family Offices; Joe Rotella, President, Northeast Region, GenSpring Family Offices

2:00 – 2:15 Break

2:15 – 3:45 - Interactive Split Sessions - Group Live (Select One)

A. PRE-MARITAL PLANNING WITH ASSET PROTECTION TRUSTS

Delaware Asset Protection Trusts have become increasingly popular for premarital planning. This panel will discuss the requirements and enforceability of prenups and how DAPTs can be used as an alternative when a prenup is impractical, undesirable or potentially unenforceable.

PANELISTS: Anne Marie Levin, JD, LL.M., SVP, National Fiduciary Advice Leader, Key National Trust Company of Delaware;

Thomas R. Pulsifer, Partner, Morris, Nichols, Arsh & Tunnell LLP; Gretchen S. Knight, Partner, Morris James LLP

B. DIRECTED TRUSTS

How to be a wise directed trustee: a frank discussion about how to juggle directions with complex investments and ensuring that your direction is sufficient.

MODERATOR: Cynthia D.M. Brown, Esq., President, Commonwealth Trust Company

PANELISTS: Anne B. Schumeyer, Vice President, PNC Delaware Trust Company; Gregory J. Weinig, Esq., Partner, Connolly Gallagher LLP; W. Donald Sparks, II, Director, Richards Layton & Finger, P.A.

C. OPPORTUNITIES TO UTILIZE CAPTIVE INSURANCE COMPANIES

With the American Tax Payer Relief Act of 2012 (ATRA), the fear of wealth depletion has changed from federal transfer taxes to income taxes, creditor protection and business transitions. A captive insurance company can allay these fears.

MODERATOR: Trisha W. Hall, Esq., Associate, Bayard, P.A.

PANELISTS: Jeffrey T. Getty, JD, MS (Tax), CFP, AEP, SVP, Senior Wealth Specialist, Key Private Bank; Mary Jo Lopez, Director, Insurance Advisory Services, Alvarez & Marsal North America, LLC

3:45 – 4:00 Break

4:00 – 6:00 - Ethics Panel Discussion - Group Live: TRUST ETHICS – COMPETENCE, CONFLICTS, CONFIDENTIALITY, AND CAPACITY

A panel discussion of how to recognize and address various ethical issues raised previously during the Conference and an examination of the applicable Delaware Lawyers' Rules of Professional Conduct.

MODERATOR: Joanna Reiver, Esq., Counsel, Potter Anderson Corroon LLP

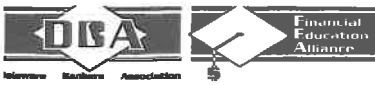
PANELISTS: Jane T. Monahan, Chief Trust Officer, UBS Trust Company, N.A.; S. Thomas Davidson, Esq., Director, Trust Administration, RBC Trust Company (Delaware), Limited; William W. Erhart, Esq., William W. Erhart, P.A.

6:00 - CLOSING REMARKS AND CONFERENCE ADJOURNMENT

Total Credits – Day 2 = 7.5

**Total Credits for 2013 Delaware Trust Conference = 15.5 CLE applied for (DE & PA) (including 2.0 Ethics Credits), CPE & ICB Credits Applied For
Conference materials will be supplied on a USB Flash Drive with hard copies at each session ● Business Attire for All Events**

Visit www.debankers.com for updates and more information!



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2013 Delaware Trust Conference

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Santora CPA Group ● US Trust Bank of America

HOTEL DISCOUNT INFORMATION:

The DBA has arranged for a number of Deluxe guest rooms to be set aside at the Hotel du Pont at the discounted rate of **\$189** per night. Those individuals wishing to reserve a room at the Hotel du Pont should contact the Hotel Reservations Department directly at (302) 594-3125 or 1-800-441-9019. Please use the group reference **#BANKERS0929** in order to receive the special group rate. The number of discounted rooms is limited and will be available on a "first come, first served" basis. Any reservations received after **Monday, September 9, 2013** will be based upon availability. Check-in time is 3:00 p.m. and check-out is Noon. If early arrivals and late departures are necessary, please let the hotel know in advance. This facility is wheelchair accessible. Please contact the DBA/FEA with any questions at 302-678-8600.

2013 Delaware Trust Conference - Program Details

EARNING OBJECTIVES: To further the understanding of the unique aspects of Delaware Trusts for the benefit of trust professionals to assure that their trust clients receive the most timely, knowledgeable and beneficial advice to maximize their trust needs.

AT COMPLETION OF THIS CONFERENCE, YOU WILL BE ABLE TO: Define the steps an international client uses when considering establishment of a Delaware Trust and apply the same to the development of their business; Apply best practices methods on satisfying client needs and trust administration; Identify and apply current trends in Delaware Trust planning to help them better serve existing clients and broaden their trust knowledge, including consideration of both state and national trends; Identify and avoid potential risks to their trust clients and the trust companies whom they represent with regard to potential litigation, particularly in the fields of document drafting and review, fiduciary oversight, trust transfer and ethics; Analyze and identify potential issues with special assets, asset protection trusts, international filing requirements for trusts.

PROGRAM CONTENT: Effective wealth management and estate planning is truly an art. That art has been perfected in the Delaware trust product. Join a distinguished group of skilled trust artisans for the 2013 Delaware Trust Conference. This year's conference will feature a detailed case study format that will weave throughout the sessions presenting participants with a complete picture of the advantages of Delaware trusts. Over 50 renowned trust, legal and accounting experts will provide "Delaware Exclusive" information in this unique event for trust and wealth management professionals, attorneys, CPAs and others in related fields. See the inside of this brochure for Daily Agenda and Speakers and the attached Registration Form.

PROGRAM LEVEL: Intermediate **PROGRAM PREREQUISITES & ADVANCE PREPARATION:** Those attending the conference will be from varied backgrounds; however all should have a minimum of a bachelor's degree from an accredited college or university. In addition, the attendees will also have a variety of higher educational degrees and designations including, but not limited to J.D., CPA, CTFA, and CFP.

DELIVERY METHOD: Group Live discussions with PowerPoint supplements. All materials presented are provided to attendees in hardcopy format as well as on a USB flash drive.

CONTINUING EDUCATION CREDITS: Attendees can earn up to 15.5 continuing education credits.

REGISTRATION INSTRUCTIONS: Both days for \$760 for DBA/FEA members; \$1000 for non-members. Daily prices are also available and are listed on the enclosed application. To register, please complete the attached registration form and fax to 302-678-5511 or call 302-678-8600

REFUND/CANCELLATION POLICY:

REFUND POLICY: If an attendee drops a seminar after the registration deadline, but at least ten (10) business days before the class starts, the drop fee is \$10.00. After that date, the attendee will be charged the full cost of the seminar. If the attendee does not drop the seminar and does not attend, s/he will be considered a "no-show" and will be charged the full cost. Qualified substitutions are permitted at any time. Continuing education credits will be given to the individual who attends the seminar.

PROGRAM CANCELLATION POLICY: The DBA/FEA reserves the right to cancel a class for insufficient enrollment. If a class is cancelled, the DBA/FEA will notify the registrants at least five (5) business days before the scheduled date and refund the course fee.

COMPLAINT RESOLUTION POLICY: Every program's relevance is guaranteed. If an attendee becomes dissatisfied with the program, she/he will receive a full refund of the enrollment fee or be permitted to attend an equivalent program at no charge.

The DBA/FEA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority of acceptance of individual courses for CPE credits. Complaints regarding registered sponsors may be addressed to National Registry of CPE Sponsors, 150 Fourth Avenue North 700, Nashville, TN 37219-2417, website www.nasba.org.