



2010 PBA WEALTH MANAGEMENT & TRUST CONFERENCE & EXHIBITION

October 27-29, 2010

Hershey Lodge & Convention Center

Conference Co-Sponsored by: PBI - Pennsylvania Bar Institute

Conference Binders Sponsored by –

Wednesday, October 27, 2010

*2:00 – 4:00 p.m. Pre-Conference.....Cocoa Suite 1

“The ABC's of Charitable Trust Administration: Primer”

**2 CPE/2 CFP / 2 CLE – substantive credit*

Richard S. Caputo

Esquire

Fox Rothschild LLP

Exton, PA

Non-IMCA CE hours have been approved for the three designations IMCA administers – CIMA®/CIMC®/CPWASM.

Pre-Conference

2

***Registration fee for this session is separate from the conference registration fee.**

4:00 p.m. Registration

4:00 p.m. – 6:30 p.m.

Exhibit Hall Opens.....Great Hall-Blue Room

Welcome Reception.....Great Hall-Blue Room

Sponsored by –

Thursday, October 28, 2010

7:30 a.m. Registration.....Registration Office – Chocolate Lobby

Continental Breakfast.....Great Hall-Blue Room

8:15 a.m. Welcome.....Trinidad Room

William L. Barnett
Conference Chairman
Senior Trust Officer
The Ephrata National Bank

8:30 a.m. General Session.....Trinidad Room

“Outlook for the Economy: The Good, The Bad, & The Ugly”

1 CFP

Jim Chessen
Chief Economist & Senior Vice President
American Bankers Association
Washington, D.C.

9:15 a.m. General Session.....Trinidad Room

“Planning in Uncertain Times in light of the Repeal of the Estate Tax in 2010”

1 substantive CLE/ 1 CFP

Charles D. Fox IV
Partner
McGuireWoods LLP
Charlottesville, VA

10:30 a.m. – 11:00 a.m. - Visit Exhibit Hall & Refreshment Break.....Great Hall-
Blue Room - **Sponsored by –**

11:10 a.m. Concurrent Sessions

“Charitable Trusts: Traps for the Unwary”- Magnolia AB

1 substantive CLE / 1 CFP

Richard S. Caputo
Esquire
Fox Rothschild LLP
Exton, PA

“Farm Estate Planning” - Magnolia CD

1 substantive CLE/ 1 CFP

Vicky Ann Trimmer
Esquire

Persun & Heim PC
Mechanicsburg, PA

“Elder Law” - Trinidad Room
1 substantive CLE/ 1 CFP

Robert Clofine
Esquire
120 Pine Grove Commons
York, PA

12:15 p.m. Luncheon.....Red Room

Speaker: Robert Snyder
PBA Chairman
President & Chief Executive Officer
Luzerne Bank
Luzerne, PA

1:30 p.m. Concurrent Sessions

- 1) **"The Intersection of Trusts and Oil & Gas Rights - Drilling for Answers"**
- Magnolia AB

1 substantive CLE/1 CFP

Scott H. DeBroff
Esquire
Rhoads & Sinon LLP
Harrisburg, PA

Thomas J. Nehilla
Esquire
Rhoads & Sinon LLP
Harrisburg, PA

- 2) **“How to turn your Financial Services Department from a simple disintermediation defense strategy into an asset gathering, revenue generating machine”**

- Magnolia CD

Wayne Whipple
Director of Business Development
Optimum Systems Plus
Scranton, PA

3) ***“Estate Planning for Non Traditional Couples” – Trinidad Room***
1 substantive CLE/ 1 CFP

Elizabeth Poggi
Esquire
Buchanan Ingersoll
Pittsburgh, PA

2:30 p.m. Visit Exhibit Hall & Ice Cream Social Break...Great Hall-Blue Room

3:00 p.m. – 4:00p.m. General Session.....Trinidad Room
“Regulatory and Legislative Update”
1 substantive CLE/ 1 CFP

William C. Ries
Esquire
Tucker Arensburg, PC
Pittsburgh, PA

4:15 p.m. – 5:30 p.m. Reception & Entertainment..... Nigerian Room
Sponsored by – Federated Investors

Friday, October 29, 2010

7:30 a.m. Registration.....Registration Office – Chocolate Lobby

Continental Breakfast.....Great Hall-Blue Room

8:00 a.m. Welcome

William L. Barnett
Conference Chairman
Senior Trust Officer
The Ephrata National Bank

8:15 a.m. General Session.....Trinidad Room

***“Ethics for Family Wealth Management Professionals: Conflicts,
Confidentiality and Common Dilemmas”.***
1 Ethics CLE / 1 CFP

Heike K. Sullivan
Esquire
Ballard Spahr LLP
Philadelphia, PA

Lindsey Ermey
Esquire
Ballard Spahr LLP
Philadelphia, PA

9:20 a.m. Concurrent Sessions

1) "Special Needs Trusts" – Magnolia AB
1 substantive CLE/ 1 CFP

Dennis McAndrews
Esquire
Shareholder
McAndrews Law Offices
York, PA

2) "Employee Benefits Update: The Current Issues Impacting Saving For Retirement" – Magnolia CD
1 substantive CLE/ 1 CFP

Richard A. Hochman
President & Chief Executive Officer
McKay, Hochman Co., Inc.
Butler, NJ

10:30 a.m. Visit Exhibit Hall & Lite Lunch BreakGreat Hall-Blue Room
Sponsored by –

11:00 a.m. General Session.....Trinidad Room

"All Weather Investment Strategies"
1 CFP

Tony Fadool
Chief Sales Strategist, Senior Vice President
Federated Investors, Inc.
Pittsburgh, PA

12:20 p.m. Exhibitor Prizes – Trinidad Room
12:45 p.m. Closing Remarks/Adjournment – Trinidad Room

Chocolate Giveaway Sponsored by –

Conference Credits:

CLE Credits – 7 substantive credits and 1 ethics credit

*****Total CLE credits earned will be determined by workshop choices*****

CPE Credits - Pre-Conference - 2 / Conference - 10 Total = 9 (Other) / 1 Taxation

**Non-IMCA CE hours have been approved for the three designations IMCA
administrators – CIMA®/CIMC®/CPWASM.**

Pre-Conference	2
Conference	9 (including 1 ethics)

CFP Credits – Pre-Conference – 2 / Conference - 12

Submitted for CTFAs credits through the Institute of Certified Bankers