



2011 PBA WEALTH MANAGEMENT & TRUST CONFERENCE & EXHIBITION

October 24 - 26, 2011

Hershey Lodge & Convention Center

Conference Co-Sponsored by: PBI - Pennsylvania Bar Institute

Conference Binders Sponsored by – Tucker Arensberg, P.C.

Monday, October 24, 2011

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

2 CPE/2 SUB CLE/2 CFP

Uniform Trust Act and Regulatory Update-- "10 Hot Button Items" Every Wealth Adviser Needs To Know

William C. Ries, Esquire **(confirmed)**

Tucker Arensberg, P.C.

Pittsburgh, PA

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

4:00 p.m. Registration.....Registration Office 2

4:00 p.m. – 6:30 p.m.

Exhibit Hall Opens.....Great American Hall - Red Room

Welcome Reception.....Great American Hall - Red Room

Co-sponsored by BPAS & Trust Sourcing Solutions

Tuesday, October 25, 2011

7:30 a.m. Registration.....Registration Office 2

Continental Breakfast.....Great American Hall – Red Room

8:00 a.m. Welcome.....Trinidad Room

Phyllis J. Harmon

Conference Chairman

Chief Operation Officer & Director of Personal Trust

LeTort Management & Trust Company

8:15 a.m. – 8:40 a.m.

Speaker:

Thomas Petro
PBA Chairman
President & Chief Executive Officer
Fox Chase Bank
Hatboro, PA

8:45 a.m.- 10:30 a.m. General Session.....Trinidad Room

Estate Planning in 2011 and Beyond

1.5 SUB CLE/1.5 CFP

Jeffrey N. Pennell, Esquire **(confirmed)**

The Richard H. Clark Professor of Law at Emory University School of Law in Atlanta

10:30 a.m. – 11:00 a.m. - Visit Exhibit Hall & Refreshment Break.....

Sponsored by – Fidelity Investments

11:10 a.m. Concurrent Sessions

1. ***"How Trust & Estate Plans are Upset by Separation & Divorce"***

– Empire AB

1 CFP

1 SUB CLE

Mary Cushing Doherty, Esquire

Stephanie E. Murphy, Esquire **(confirmed)**

High Swartz LLP

Norristown, PA

2. ***"Managing Fixed Income Investments in a Low Interest Rate Environment"***

- Empire CD

1 CFP

Alex Urbani, CFA **(confirmed)**

Managing Director

MainStreet Advisors

Chicago, IL

3. ***Capturing & Managing Marcellus Shale Wealth: How Bankers Can Help*** - Trinidad Room

1 CFP

1 SUB CLE

Vicky Ann Trimmer, CPA, Esq. **(confirmed)**
Persun & Heim PC
Mechanicsburg, PA

12:15 p.m. Luncheon.....Aztec Room
Sponsored by – Stewart Capital Advisor, LLC

1:30 p.m. Concurrent Sessions

1) ***Special Needs Trust*** - Trinidad Room

1 CFP

1 SUB CLE

Dennis McAndrews, Esq. **(confirmed)**
Shareholder
McAndrews Law Offices
York, PA

2) ***Ins and Outs of Holding Real Estate in a Trust***– Empire AB

1 CFP

1 SUB CLE

Susan H. Confair, Esquire **(confirmed)**
Reager & Adler
Camp Hill, PA

3) ***Alternative Investments***– Empire CD

1 CFP

Eugene J. Eignor **(confirmed)**
Regional Vice President
DWS Investments, Inc.
Centreville, VA

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

Sponsored by – Broadridge Financial Solutions

3:00 p.m. – 4:00 p.m. General Session..... Trinidad Room

Social Media: Benefits, Risks & Compliance

Raj Patel (confirmed)

Partner

Technology Consulting & Solutions

Plante & Moran, PLLC,

Southfield, MI

4:15 p.m. – 5:30 p.m. Reception & Entertainment..... Aztec Room

Sponsored by – Federated Investors

Wednesday, October 26, 2011

7:30 a.m. Registration.....Registration Office 2

Continental Breakfast.....Great American Hall - Red Room

Sponsored by –

8:00 a.m. Welcome.....Trinidad Room

Phyllis J. Harmon

Conference Chairman

Chief Operation Officer & Director of Personal Trust

LeTort Management & Trust Company

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

Ethical Considerations In Wealth Management

1 ETHICS CLE

William C. Ries, Esquire (confirmed)

Tucker Arensberg, P.C.

Pittsburgh, PA

9:20 a.m. Concurrent Sessions

1) Dealing with Clients with Diminished Capacity: Understanding the Issues, Finding the Right Solution - Trinidad Room

1 CFP

1 SUB CLE

Martin J. Hagan, Esquire (**confirmed**)
Law Firm of Martin J. Hagan LLC
Pittsburgh, PA

2) *The Changing Landscape of Employee Health Care Benefits*

– Empire AB

1 CFP

Joseph C. Lennert, CEBS (**confirmed**)
President & CEO
CARUSO BENEFITS GROUP, INC.
A National Penn Company
Bethlehem, PA

3) *Following Your Client Assets(Funds) Overseas/Internationally*

– Empire CD

Adam Bailey (**confirmed**)
Vice President & Senior Product Manager
JP Morgan
New York, NY

10:30 a.m. Visit Exhibit Hall & Lite Lunch Break Great American Hall -
Red Room

Sponsored by –

11:00 a.m. General Session & Individual Exhibitor Give-Aways...Trinidad Room

11: 15 a.m. – 12: 15 p.m.

***The Grass is Always Greener When You Water It: Common Sense Ways to Grow
Your Sales***

Tony Fadool (**confirmed**)
Chief Sales Strategist, Senior Vice President
Federated Investors, Inc.
Pittsburgh, PA

12:20 p.m. Closing Remarks/Grand Exhibitor Bingo Prize/Adjournment

Chocolate Giveaway Sponsored by – ProxyTrust

Submitted for the following credits:

**CPE Credits - Pre-Conference - 2 / Conference - 10 (Specialized Knowledge and
Applications) – Total - 12**

CLE Credits

Pre-Conference – 2 SUB CLE

Conference – 4.5 SUB CLE & 1 ETHICS CLE

Total CLE credits earned will be determined by workshop choices

CFP Credits

Pre-Conference – 2

Conference – 9.5 Total

Total CFP credits earned will be determined by workshop choices

ICB Credits: CTFA – 11.75

- ETH: 1.5

- FID: 6.5

- FP: 2.75

- TAX: 1