

# 2020 VIRTUAL TRI-STATE TRUST FORUM

SEPTEMBER 21-22, 2020



The New Hampshire Bankers Association, in cooperation with the Maine Bankers Association and Vermont Bankers Association, Inc. Trust Committees, invites you to attend this year's virtual Tri-State Trust Forum.

MAINE  
BANKERS  
Association

NH Bankers  
ASSOCIATION

Vermont Bankers Association  
VBA

# 2020 TRI-STATE TRUST FORUM

SEPTEMBER 20-21, 2020 | VIRTUAL

## AGENDA

### MONDAY

### SEPTEMBER 21

1:00 PM - 1:15 PM

**PLATINUM SPONSOR ROOMS OPEN**

1:15 PM - 1:25 PM

**WELCOME**

**Valerie Nevel**, VP, Senior Financial Advisor - Ledyard Financial Advisors  
Chair, NH Bankers Trust Committee

**Daniel Kimbell**, EVP, Managing Director, Passumpsic Financial Advisors  
Chair, Vermont Bankers Association Trust Committee

1:25 PM - 2:25 PM

**EXPLORING A DYNAMIC SPENDING POLICY – AN ALTERNATIVE TO TRADITIONAL THOUGHT**

**Vanguard** – Speaker TBD

2:25 PM - 2:45 PM

**PLATINUM SPONSOR ROOMS OPEN**

2:45 PM - 4:15 PM

**ETHICS FOR FINANCIAL ADVISORS & TRUST OFFICERS**  
**The Knowledge Institute, LLC**

4:15 PM - 5:00 PM

**NETWORKING AND FUN!**

### TUESDAY

### SEPTEMBER 22

9:00 AM - 9:15 PM

**PLATINUM SPONSOR ROOMS OPEN**

9:15 AM - 9:30 AM

**WELCOME**

**Valerie Nevel**, VP, Senior Financial Advisor - Ledyard Financial Advisors  
Chair, NH Bankers Trust Committee

**Daniel Kimbell**, EVP, Managing Director, Passumpsic Financial Advisors  
Chair, Vermont Bankers Association Trust Committee

9:30 AM - 10:15 AM

**LEGISLATIVE & FIDUCIARY ISSUES FROM WASHINGTON**

**Phoebe A. Papageorgiou**  
Vice President, Trust Policy  
American Bankers Association

Catch the latest regulatory and legislative developments affecting the trust and wealth management industry, with a focus on banking and securities rulemaking.

10:15 AM - 11:00 AM

**ECONOMIC UPDATE**  
Speaker Invited

11:00 AM - 11:10 AM

**PLATINUM AND GOLD SPONSOR DOOR PRIZES / ADJOURNMENT**