



An ITA Seminar

ITA Two-Day Trust Operations Online Seminar

The Big Picture of Trust Operations

Amazing value for Cannon training!

November 4-5, 2020

Online Seminar

Presented by Cannon Financial Institute



CANNON
FINANCIAL INSTITUTE

This two-day seminar focuses on why trust departments do what they do. As an trust operations professional this seminar will expose you to principles and rules that govern the industry, including regulatory and legal framework within which trust departments and trust companies operate today.

AGENDA FOR BOTH DAYS

9:00 a.m.	Program
Noon	Lunch
4:00 p.m.	Adjourn

Target Audience:

This seminar is designed for any trust operations staff working in personal trust and estate accounts and wealth management. It is developed at the beginning to intermediate level, but any trust operations staff will gain benefit from the information.

Continuing Education

Continuing education hours applied for this program based on 14 hours of instruction.

CTFA Hours -applied

CFP Hours -applied

Sponsored by:



Seminar Highlights

1. Fiduciary Industry Overview
2. Best Practices
 - 2.1. Fee Processing
 - 2.2. Collections
3. IRA Administration Issues
4. Uniform Fiduciary Income & Principal Act
5. Investment Policy Statements
6. Regulatory Focus
7. SECURE Act Review
8. Account Reviews: Six Types
9. Board & Management Reporting Best Practices
10. Account Risk-Rating Process



Iowa Trust Association Trust Operations Online Seminar • November 4-5, 2020

REGISTRATION INFORMATION

	<u>Registration Fee (per person)</u>
ITA Member	\$495
Nonmember	\$695

(Registration fee is per person.)

Refunds less \$20 will be made if requested one week prior to seminar date. No refunds after that date. Substitutions allowed at any time.

Mail this form with payment to:

Attn: Registrar

Iowa Trust Association

8800 NW 62nd Ave., Johnston, IA 50131

or FAX to: (515) 280-4140 (You will be invoiced.)

Bank _____

Address _____

City _____ State _____ Zip _____

Phone: _____

1. Name: _____

Email: _____

2. Name: _____

Email: _____

ITA Two-Day Trust Operations Online Seminar

The Big Picture of Trust Operations



November 4-5, 2020
Online Seminar

Presented by Cannon Financial Institute &
sponsored by Infovisa



AGENDA FOR BOTH DAYS

9:00 a.m.	Program
Noon	Lunch
4:00 p.m.	Adjourn

Seminar Location

Seminar will be online on both November 4 and November 5. Links will be provided to registrants several days prior to the online seminar. Contact ITA's Darcy Burnett at dburnett@iowabankers.com with questions.

Sponsored by:



About the Speaker

Duane E. Lee, II serves as an Executive Vice President with Cannon Financial Institute. Duane is an incredible expert in the Fiduciary Services Industry. He believes rules of engagement are not merely guidelines but valuable tools that when executed properly, drive increased shareholder value, employee performance, and client satisfaction. Duane served the financial services industry in a variety of roles. His career highlights include; Board Member of an independent trust company, Administrative Vice President-in charge of trust administration and securities operations of a large regional bank, Senior Vice President and Trust Executive managing a trust company supporting a seven member bank holding company and a National Trust Examiner with the Office of the Comptroller of the Currency. It is this unique combination of experiences that provides both a balanced and focused instructional experience.

Iowa Trust



Association

REGISTER TODAY!