2023 TRI-STATE TRUST FORUM

SEPTEMBER 28 & 29, 2023
Venue at Portwalk Place
Portsmouth, NH

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 Tri-State Trust Forum.

Maine Bankers Association

NH›Bankers Association

VBA Vermont Bankers Association, Inc.

MAINE BANKERS ASSOCIATION | NH BANKERS ASSOCATION | VT BANKERS ASSOCIATION

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AGENDA

THURSDAY	SEPTEMBER 28
8:00 AM – 9:30 AM	**EXHIBITOR & SPONSOR SET UP**
9:30 AM – 10:00 AM	**REGISTRATION & COFFEE WITH EXHIBITORS AND SPONSORS** **Sponsors:** **Thursday Opening Lunch - Federated Hermes** **Thursday Afternoon Break – Wolf & Company, PC** **Thursday Afternoon Reception – Fifth Third** **Friday Morning Breakfast – Cheetah** **Exhibitors:** **American Funds/Capital Group** **FCI Advisors** **Northern Trust Asset Management** **Proxytrust** **R&T Deposit Solutions** **SS&C Innovest** **Thomson Reuters** **Vanguard Financial Advisor Service**
10:00 AM – 10:05 AM	**WELCOME** ***Susan Martore-Baker,*** *President*, Cambridge Trust Company of NH *Chair*, NH Bankers Association Trust Committee ***Daniel Kimbell,*** *CTFA, CRSP, EVP, Managing Director*, Passumpsic Financial Advisors *Chair*, Vermont Bankers Association Trust Committee
10:05 AM – 10:35 AM	**DIGITAL ASSETS – MEETING INVESTOR DEMANDS ON NEW TECHNOLOGIES** **Ada Paddock,** *Internal Audit Manager* **Merry Piotti,** *Principal* Wolf & Company, P.C. Financial professionals should be active and stay up to date on emerging technologies like digital assets/blockchain & cryptocurrency to have better conversations with clients and meet their needs. During this session, we will discuss the core concepts and provide a basic understanding of blockchain technology and digital assets and why they matter to your customer base. We will also discuss the rapidly changing regulatory landscape regarding this asset class and how to prepare operationally to address this need. You'll learn: • The fundamental aspects of blockchain and digital assets • Emerging regulatory guidance regarding this asset class • Best practices when it comes to custody, safekeeping and accounting for these assets
10:35 AM – 11:35 AM	**TRI-STATE ECONOMIC UPDATE** **Brian Gottlob,** *Director, Economic and Labor Market Information Bureau Director* NH Department of Employment Security A view of the local tri-state economy.

11:35 AM – 12:35 PM	**LUNCH WITH THE EXHIBITORS AND SPONSORS** **Sponsored by Federated Hermes**
12:35 PM – 1:45 PM	**ADVISOR RELEVANCE: TODAY AND TOMORROW** **J. Phil Buchanan,** *Executive Chair of the Board, CFP®, CWS®* Cannon Financial Financial Advisors are dealing with seven current significant disruptions that in combination, are breaking down the advisor's foundational value promise to the market. This program explores what is necessary to turn the challenges into opportunities and addresses the question "How do we keep Advisors relevant in financial services?"
1:45 PM - 2:45 PM	**GROWING WALLET SHARE - INSIGHTS FROM AN INVESTOR BEHAVIORAL STUDY** **Laura Hanichak Gregg**, *SVP, Director of Practice Management and Advisor Research* Northern Trust Asset Management Want to grow assets with existing clients? There's no easy button. Some clients are transparent and trusting; others are skeptical and opaque. Learn the emotional drivers of five client personas and how to identify them. We'll offer targeted strategies by persona to more efficiently build trust, transparency and wallet share.
2:45 PM - 3:15 PM	**AFTERNOON BREAK WITH EXHIBITORS** **Sponsored by Wolf & Company, PC**
3:15 PM - 4:15 PM	**PERFORMANCE AND PRODUCTIVITY METRICS - INDUSTRY TRENDS AND THE TOP PERFORMERS** **Loyd Pohl,** *Chief Executive Officer* Pohl Consulting & Training, Inc. What are the important metrics in our industry? What can these metrics tell us? What do the trends tell us? How can we assess where we are and what we need to do next, to maximize our revenue and its growth. Consistent top performance is challenging, it relies on a mixture of sales, growth, profit, and management and doesn't come from silver bullets, gimmicks, or quick fixes. This presentation will draw from 15 years of TRUSTCOMPARE™ data to identify the metrics which require attention in order to achieve Top Performer status. Our long history of real world experience helping wealth management professionals deal with complex situations will make this material especially useful to leaders both new or experienced.
4:15 PM - 5:15 PM	**EXHIBITOR RECEPTION** **Sponsored by Fifth Third Institutional Custody** Join us for a reception and peer discussions. Also take a little time to thank our sponsors/exhibitors for their support of our event.

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FRIDAY	SEPTEMBER 29
8:15 AM – 9:00 AM	**FULL BREAKFAST BUFFET WITH EXHIBITORS AND SPONSORS** **Sponsored by Cheetah** **Sponsors:** **Thursday Opening Lunch - Federated Hermes** **Thursday Afternoon Break – Wolf & Company, PC** **Thursday Afternoon Reception – Fifth Third** **Friday Morning Breakfast – Cheetah** **Exhibitors:** **American Funds/Capital Group** **FCI Advisors** **Northern Trust Asset Management** **Proxytrust** **R&T Deposit Solutions** **SS&C Innovest** **Thomson Reuters** **Vanguard Financial Advisor Service**
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9:05 AM - 10:05 AM	**STATE OF THE STATE OF DIGITAL MARKETING** **Linda Varrell,** *APR* Broadreach Public Relations A look at the current state of the digital marketing including strategies to meet your current customer needs as well as attract new ones.
10:05 AM – 10:25 AM	**MORNING BEVERAGE BREAK WITH THE EXHIBITORS**
10:30 AM – 11:30 AM	**SECURE 2.0 CHANGES TO TAX LAWS/RETIREMENT PLANS** **Michael F. Macero,** *Director, Washington National Tax* KPMG LLP The SECURE 2.0 Act makes major changes to 401(k), IRA, Roth, and other retirement savings plans. This session will cover what you need to know.
11:30 AM – 12:00 PM	**CHARITABLY MINDED: WHAT GIVING VEHICLE IS RIGHT FOR YOUR CLIENTS?** **John Bingham**, *VP Business Development* SS&C Innovest With Americans giving away $485 billion to charity, financial advisors have a wealth of philanthropic options for their clients, from DAFs to Endowments. During this session, we will discuss the different forms of giving and help you find the one that is right for you.
12:00 PM	**ADJOURNMENT**