

2026 NTCHBA Conference - Drury Plaza Hotel Downtown 300 Korean Veterans Blvd, Nashville, TN 37201			
	Location	Time	Presenters
Monday, September 28, 2026			
Registration		9:00 AM - 12:00 PM	
NTCHBA Opening Business Welcome & Kickoff	BELMONT BALLROOM	1:00 PM - 1:15 PM	Lee Ritter, JPM
Thoughtful Handling of Concentrated Assets	BELMONT BALLROOM	1:15 PM - 2:15 PM	Andrew Tanner, BofA
Internal IRS Vantage Point	BELMONT BALLROOM	2:15 PM - 2:45 PM	Doug Knapp, DM&A
Break sponsored by J&M Asset Management		2:45 PM - 3:00 PM	
Court Case Update	BELMONT BALLROOM	3:00 PM - 3:30 PM	Todd Povlich, MPI
Artwork & Collectibles	BELMONT BALLROOM	3:30 PM - 4:15 PM	Ron Varney, Ronald Varney Fine Art Advisors
Board Governance	BELMONT BALLROOM	4:15 PM - 5:00 PM	Patrick Alyward, TRUSTworthy Consultants
Hotel Happy Hour		5:00 PM - 6:00 PM	Complimentary for Drury Hotel Guests
Special Event Pinewood Social (Vintage Bowling) Drinks & Dinner sponsored by DM&A, MPI, and SS&C	33 Peabody St, Nashville, TN 37210	5:30 PM - 8:30 PM	

Tuesday, September 29, 2026			
Breakfast	GUEST DINING	7:00 AM - 8:00 AM	Complimentary for Drury Hotel Guests
M&A Market Update	BELMONT BALLROOM	8:00 AM - 9:00 AM	Greenwich Capital, Frank McGrew
Managing the Enterprise Risk of Family Assets	BELMONT BALLROOM	9:00 AM - 10:00 AM	RSM, Ron Nahass and Jamie Sanders
Break sponsored by Greenwich Capital		10:00 AM - 10:15 AM	
Duties of Trustees Managing Closely Held Business Interests	BELMONT BALLROOM	10:15 AM - 11:15 AM	David Johnson, Winstead
Valuation Roundtable	BELMONT BALLROOM	11:15 AM - 12:15 PM	Chris Peifer, JPM (Moderator) Eric Ward, AltaView Advisors Todd Povlich, MPI Curtis Kimball, Vinewood Investment Analytics
Lunch sponsored by NTCHBA		12:15 PM - 1:15 PM	
Board Vote	BELMONT BALLROOM	1:15 PM - 1:30 PM	
Music Royalties	BELMONT BALLROOM	1:30 PM - 2:30 PM	Jennifer Lash, CMG Worldwide
Estate Planning Considerations	BELMONT BALLROOM	2:30 PM - 3:30 PM	Christine Wakeman, Winstead
Break sponsored by Winstead		3:30 PM - 3:45 PM	
Digital Assets (Moderated Discussion)	BELMONT BALLROOM	3:45 PM - 4:15 PM	Patrick Alyward, TRUSTworthy Consultants Bruce Hendryx, PNC
Topic AI Keynote Speaker	BELMONT BALLROOM	4:15 PM - 5:15 PM	Chris Nekvinda, Cannon Financial
Special Event Chief's on Broadway (2nd Floor - Friendly Shadows) Drinks & Dinner sponsored by AltaView Advisors, ITM, and Vinewood Investment Analytics	200 Broadway, Nashville, TN 37201	6:00 PM - 8:00 PM	

Wednesday, September 30, 2026			
Breakfast	GUEST DINING	7:00 AM - 8:00 AM	Complimentary for Drury Hotel Guests
Private Jet Sales Case Study	BELMONT BALLROOM	8:00 AM - 8:40 AM	Dave Coleman, Coleman Jet
Liquidation	BELMONT BALLROOM	8:40 AM - 9:20 AM	Jake DiIorio, JS Held
Auto Dealerships	BELMONT BALLROOM	9:20 AM - 10:00 AM	David Harkins, Mercer
Break sponsored by Coleman Jet Solutions		10:00 AM - 10:15 AM	
Real Estate Considerations	BELMONT BALLROOM	10:15 AM - 11:00 AM	James Bohnaker, Cushman & Wakefield
Best Practices Round Table	BELMONT BALLROOM	11:00 AM - 12:00 PM	Lee Ritter, JPM (Moderator) PNC Huntington Wells Fargo Northern Trust Bank of America
Boxed Lunches sponsored by RSM		12:00 PM - 1:00 PM	Thank you for coming!! See you next year!

