

NATIONAL TRUST CLOSELY HELD BUSINESS ASSOCIATION



Photograph: The Driskill Hotel, Austin, Texas

2019 NTCHBA Conference And Registration Information

national trust closely held business association

— **NTCHBA** —

The

National Trust Closely Held Business Association

is proud to present the

NTCHBA 44th Annual Conference

September 9-12, 2019

at

The Driskill Hotel

Austin, Texas

Hosted by Bank of America

BANK OF AMERICA



Bank of America is proud to host the 44th Annual National Trust Closely Held Business Association (NTCHBA) Conference, September 9-12, 2019, at The Driskill Hotel, Austin, Texas (<https://driskillhotel.com>)

This year's conference will provide an opportunity for individuals within the corporate fiduciary, trust and estate industries to come together for important educational topics essential to closely held asset management and give attendees the opportunity to network with colleagues from across the country. We hope you will join us in Austin!

REGISTRATION INFORMATION

REGISTER BY MONDAY, JULY 29, 2019 FOR EARLY BIRD RATE

Conference Rate: \$1,600

Registrations after July 29- \$1,700 (on a space available basis)

The Conference Rate includes:

3-Nights of accommodations at The Driskill Hotel

All meals, snacks and beverages

Conference meetings and materials

AND

Special Event

Attendance at the NTCHBA conference is limited to persons for whom the management of closely held business assets in a fiduciary capacity is a principal business activity, as well as professionals such as business appraisers, attorneys, accountants and other professional advisors who support the management of such assets. Attendance is limited to the first 75 registrants. Registration fees include meals, snacks, special events and three nights hotel accommodation. Registration does not include travel expenses and incidental costs.

[Register Online Now!](#)

CONFERENCE DETAILS

Schedule and Topics

Conference Begins: Monday, September 9, 2019

Check-in beginning at 3:00 with a Welcome Reception and Dinner at 6:00 PM

Conference Ends: Attendees should plan on departures beginning

Thursday morning, September 12, 2019

EDUCATIONAL SESSIONS:

The conference will cover many of the topics we deal with in the management of closely held business assets. A partial list of topics includes:

- Valuation Case Update
- Governance
- New tax law impacts for Closely Held Businesses
- Transitioning a Business within Families
- Managing Underlying Assets in Entities
- Private Equity Market Environment
- Managing and Reducing HR Risks in Operating Companies
- Managing Transactional Risk from a Legal and Valuation Standpoint

Additional program information, topic discussions and more will be available on the [NTCHBA Website](#), as it becomes available.

VENUE

**The Driskill Hotel
604 Brazos Street
Austin, Texas 78701
<https://driskillhotel.com>**

LOCATION AND TRAVEL

The Driskill is an iconic hotel in the heart of downtown Austin. This landmark of Texas hospitality is ready to welcome you to be a part of Texas history. If it's music you love, check out Austin's more than 250 live music venues! And for something completely unusual, watch the second largest urban bat colony in the world takes flight at sunset from the Congress Street Bridge.

Airport:

Austin-Bergstrom International Airport (AUS)

Attendees are responsible for arranging travel between the Airport and The Driskill Hotel.

SPECIAL EVENT

Wednesday evening, September 11, 2019 – our Special Event is going to be Super Special this year – one you will NOT want to miss (ya'll know everything is bigger in Texas). More information will come as we work out all the details.

CONTINUING EDUCATION CREDITS

An additional fee of \$100 is required for Continuing Education Credits

CPE

NTCHBA is an approved provider of CPE credits. An Additional Fee of \$100.00 will be charged for CPE credits.

Program Level:	Intermediate
Required Prerequisites:	None
Advanced Preparation:	None
Delivery Method:	Group Live
Field of Study:	Specialized Knowledge
CPE Credit:	15.50 credits

Program Learning Objectives:

At the completion of this conference, you should be able to:

- Understand the key fiduciary risks associated with the management of closely held assets.
- Identify current trends impacting the holding/management of closely held business interests
- Understand how major financial institutions are addressing various aspects of fiduciary asset management of closely-held business interests.
- Apply the knowledge learned to your own fiduciary asset management practices in order to provide better client service and minimize claims and losses.

The National Trust Closely Held Business Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its web site: www.nasbaregistry.org.

CTFA

NTCHBA will be applying for the Certified Trust and Financial Advisors (CTFA) continuing education credits. An additional fee of \$100.00 will be charged for CTFA credits.

THANK YOU TO OUR CONFERENCE SPONSORS

**ComStock Advisors
CliftonLarsenAllen
J&M Asset Management, Ltd.
Foley Gardere
Management Planning Inc.
Stout
Willamette Management Associates
Wilson Elser**

REFUND POLICY

All requests for refunds must be submitted in writing. Please e-mail refund requests to gloria@ntchba.org. Registration fees will be refunded if written notice is received no later than Monday, July 29, 2019, less any fees incurred by the NTCHBA due to the said cancellation. There will be no refunds after this date. Extenuating circumstances may be considered on an individual basis at the discretion of the Board. Substitutions are permitted without added cost or penalty at any time prior to the start of the conference.

QUESTIONS?

If you have any questions about the conference, registration or administrative policies please contact Gloria Isackson at gloria@ntchba.org, or (520) 727-7129.