

ADVANCED TRUST SCHOOL
August 20-22, 2019 ~ Holiday Inn Southwest ~ Omaha, Nebraska

TUESDAY August 20	WEDNESDAY August 21	THURSDAY August 22
7:30-8:00 am Registration	7:00-8:00 am Breakfast	7:00-8:00 am Breakfast
8:00 am-8:45 am Welcome & Orientation 8:45 am-10:00 am Advanced Account Administration	8:00 am-10:00 am Compliance and Ethics	8:00 am-9:45 am Trust Department Management Panel
10:00-10:15 am Break	10:00-10:15 am Break	9:45-10:00 am Break
10:15 am-11:45 am Advanced Account Administration (continued)	10:15 am-11:15 am Compliance and Ethics (continued) 11:15 am-12:00 pm Trades, Settlements and Clearing	10:00 am-12:00 pm Investments
11:45 am-12:30 pm Lunch	12:00-12:45 pm Lunch	12:00-12:45 pm Lunch
12:30 pm-2:45 pm Retirement Planning	12:45 pm-1:30 pm Trades, Settlements and Clearing (continued) 1:30 pm-2:30 pm Receipts & Disbursements	12:45 pm-1:30 pm Investments (continued) 1:30 pm-2:30 pm Relationship Management
2:45-3:00 pm Break	2:30-2:45 pm Break	2:30-2:45 pm Break
3:00 pm-4:30 pm Understanding Unique Transactions and Unique Assets	2:45 pm-4:45 pm Understanding Estate Planning Techniques	2:45 pm-4:00 pm Relationship Management 4:00 pm-4:15 pm Closing Comments (Note: Schedule subject to variations in sequence and minor adjustments in length of class sessions.)
5:30 pm-7:00 pm Pizza Dinner	FREE EVENING	4:15 pm Adjourn