



# Schools of Banking

## SCHOOL OF TRUST & FINANCIAL SERVICES

AUGUST 19-23, 2019 ~ OMAHA, NEBRASKA

## ADVANCED TRUST SCHOOL

FOR ADMINISTRATIVE & OPERATIONS PERSONNEL

AUGUST 20-22, 2019 ~ OMAHA, NEBRASKA



### BENEFITS

Whether individuals attend the School of Trust & Financial Services or the Advanced Trust School they will have the opportunity to:

- ◆ Increase understanding and further knowledge of all functions in the trust area
- ◆ Increase understanding of the responsibilities and liabilities of the fiduciary relationship
- ◆ Explore current issues and trends in the trust industry
- ◆ Gain practical ideas to increase personal productivity and improve department/company performance and profits
- ◆ Learn skills and approaches for improving customer development and retention
- ◆ Gain an excellent foundation for continued study in the trust field
- ◆ Exchange ideas and information with other trust professionals who are at similar places in their careers

### WHO SHOULD ATTEND?

The **School of Trust & Financial Services** provides broad trust instruction appropriate for:

- ◆ New trust department personnel (a minimum of six months trust experience is suggested)
- ◆ Specialized trust personnel seeking to broaden their knowledge
- ◆ Trust administrative assistants
- ◆ Internal audit staff
- ◆ Bank attorneys and officers entering the trust department
- ◆ Senior management considering establishing or re-emphasizing a trust department
- ◆ Experienced trust professionals desiring to update their trust knowledge and skills

Attendance at the **Advanced Trust School** is ideal for:

- ◆ Graduates of the School of Trust & Financial Services
- ◆ Trust professionals who have a minimum of four years of progressive trust experience
- ◆ Trust personnel from all sizes of banks and trust companies

"It is very crucial to get a comprehensive background in trust and financial services. I really enjoyed the classes. The instructors take time to explain difficult topics. Students probed the instructors to delve deeper into various subjects. Asking questions was encouraged, and I feel that's the best way to learn."

- Mark McClain, Trust Officer  
The Peoples Bank, Smith Center, Kansas



Sponsored by the Kansas and Nebraska Bankers Associations, Iowa Trust Association and KBA Kansas Trust Division.  
Partnering with the Colorado, Indiana, Minnesota, Missouri, North Dakota, South Dakota and Wyoming Bankers Associations.

## CURRICULUM

### SCHOOL OF TRUST & FINANCIAL SERVICES

- ◆ Overview of the Trust Industry
  - ◆ Trust Administration
    - ◆ Investments
  - ◆ Fiduciary Income Taxes
- ◆ Personal Retirement Planning Concepts
  - ◆ Compliance
  - ◆ Trust Accounting and Securities Processing
- ◆ Probate and Conservatorships
  - ◆ Estate Planning
- ◆ Personality/Communication Styles

### ADVANCED TRUST SCHOOL

- ◆ Advanced Account Administration
  - ◆ Compliance & Ethics Issues
    - ◆ Retirement Planning
  - ◆ Relationship Management
    - ◆ Investments
  - ◆ Receipts & Disbursements
- ◆ Trades, Settlements & Clearing
- ◆ Trust Department Management Panel
  - ◆ Understanding Unique Transactions & Assets
  - ◆ Understanding Estate Planning Techniques

## ADMISSION

### ENROLLMENT FEES:

School of Trust & Financial Services (STFS)  
\$1,550 - Single Housing  
\$1,450 - Double Housing (if available)  
\$1,350 - No Housing

Advanced Trust School (ATS)  
\$995 - Single Housing  
\$950 - Double Housing (if available)  
\$900 - No Housing

Enrollment fees include instruction, scheduled breakfasts, lunches, break service, one reception, classroom materials, four nights lodging for STFS students and two nights lodging for ATS students. Nonmembers of their State Banking or Trust Association pay an additional administrative fee of \$675 for STFS and \$450 for ATS.

Continuing Education: The Trust Schools may meet continuing education requirements for professional, legal, CPA or insurance licenses. Please contact our office for more information. At least eight weeks notice before the School is required.



Register online at:

<https://schoolsofbanking.com/trust>

Deadline is July 19, 2019.