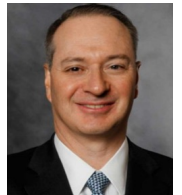
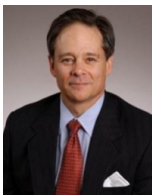




NEVADA TRUST CONFERENCE
March 1 & 2, 2022
Virtual Conference



INTERACTIVE VIRTUAL PRESENTATIONS
11:00 AM – 2:00 PM PACIFIC

REGISTRATION: \$159 PER PERSON
REGISTRATION FORM AT WWW.NVBANKERS.ORG/TRUST OR CALL 702-233-8607

AGENDA

March 1, 2022 | 11:00 am – 2:00 pm PACIFIC

11:00 am – Welcome

11:15 am A SPECIAL BENEFICIARY FLEXIBLE TRUST TO REDUCE TAX ON TRUST INCOME Jonathan G. Blattmachr, Esq., *Principal Pioneer Wealth Partners*

12:10 pm BUILDING TRUST SOLUTIONS TO WITHSTAND SCRUTINY Michaelle D. Rafferty, Esq., *Shareholder Maupin, Cox & LeGoy*

1:05 pm UPDATE ON NEVADA TRUST LAW, WHAT'S NEW Robert E. Armstrong, Esq., *Partner McDonald Carano*

1:20 pm NEVADA TRUST TAX UPDATES, Alan Freer, Esq., *Partner Solomon Dwiggin Freer & Steadman, LTD*

1:35 pm PANEL Q&A WITH NEVADA EXPERTS, Alan Freer, Esq., *Partner, Solomon Dwiggin Freer & Steadman, LTD*, Bob Armstrong, Esq *Partner, McDonald Carano*, Michaelle D. Rafferty, Esq., *Shareholder, Maupin, Cox & LeGoy*

2:00 pm – Day One Wrap up

March 2, 2022 | 11:00 am – 2:00 pm Pacific

11:00 am - Welcome

11:05 am THE ART OF TAX ISSUES AND OTHER CONCERNS FOR ART COLLECTORS, Paul N. Frimmer, Esq., *Partner Loeb & Loeb LLP*

11:55 am TAX PLANNING FOR SELLING BUSINESSES, Robert Keebler, *Parter Keebler & Associates*

12:50 pm NEVADA ROUNDTABLE – AN INTERACTIVE DISCUSSION WITH NEVADA PRACTITIONERS Nevada's leading trust experts discuss hot topics and address audience questions

1:10 pm FORMING A CRYPTO & DIGITAL TRUST COMPANY: REGULATORY CONSIDERATIONS FOR FORMING AND OPERATING A NEVADA TRUST COMPANY PROVIDING DIGITAL ASSET CUSTODY AND SERVICES, Matthew D. Saltzman, Esq., *Managing Shareholder Saltzman Mungan Dushoff And Matthew Wolf Director of Blockchain and Digital Assets, RSM US LLP*

2:00 pm – Day Two and Event Wrap up

Please note: We will make every effort to adhere to very strict timing, however there may be slight adjustments necessary.



SPEAKERS



Robert Armstrong, Partner
McDonald Carano law firm

Robert Armstrong is a third-generation Nevadan with unmatched expertise advising high net worth clients and family trust companies on Nevada's trust, estate and tax planning legal and regulatory landscape. Bob has over forty years of experience serving clients as an attorney and a non-practicing CPA. He is a Fellow of the American College of Trust and Estate Counsel and a member of the American Institute of Certified Public Accountants among other affiliations. Bob has received six "Lawyer of the Year" awards from The Best Lawyers in America and is currently ranked for the 5th consecutive year in the highest Band 1 category for Private Wealth Law in Chambers USA High Net Worth Guide. He received his juris doctorate from Georgetown Law Center and a LL.M. in taxation from New York University.



Jonathan Blattmachr, Principal
Pioneer Wealth Management

Listed in The Best Lawyers in America, Jonathan G. Blattmachris a Principal in Pioneer Wealth Partners, in the estate planning advisory group. He gives lectures and has written extensively on estate and trust taxation and charitable giving. Mr. Blattmachris was a Harlan Fiske Scholar at the Columbia University School of Law, where he received his law degree and graduated cum laude. He has an A.B. from Bucknell University in mathematics. Mr. Blattmachris has written nine books and over 500 articles on estate planning and other tax issues. He has been an Advisor on The American Law Institute, Restatement of the Law, and Trusts 3rd; he is a member of the American Bar Foundation. He is a retired member of Milbank Tweed Hadley & McCloy LLP and of the Alaska, California and New York State bar associations.



Alan Freer, Partner
Solomon Dwigins and Freer Steadman

Alan D. Freer is a member of the Las Vegas law firm of Solomon Dwigins Freer & Steadman, LTD., where he focuses his practice primarily on trust and estate litigation. Mr. Freer also handles all aspects of trust and estate administration, and routinely represents beneficiaries and fiduciaries in contested matters. He has substantial experience in challenging and defending the validity of estate planning documents, including wills, codicils, trusts and amendments. Mr. Freer also routinely prosecutes and defends claims for breach of fiduciary duty, fraud, undue influence, breach of trust, accounting, fiduciary removal, competency, lack of capacity, unjust enrichment, closely held business disputes and elder abuse. Mr. Freer has received the highest "AV Preeminent Rating" by Martindale-Hubbell and has twice been recognized as the Lawyer of the Year for Southern Nevada in the area of "Trust and Estates" (2020) and "Trust and Estate Litigation" (2017) by Best Lawyers of America. Mr. Freer has also been recognized as one of the top 100 lawyers in the mountain states region by Super Lawyers. Mr. Freer is a member of the State Bar of Nevada and serves on several committees.



Paul Frimmer, Partner
Loeb & Loeb, LLP

Paul Frimmer focuses on estate planning, wills and trusts, probate and trust administration, postmortem tax planning, probate litigation, art law, charitable giving, and tax issues relating to these matters. Widely regarded as one of the top estate planning attorneys in the country, Paul has received numerous accolades for his work. He's known for taking a collaborative approach with his clients and guiding them toward the best decisions tailored to meet their individual needs. Paul has authored and co-authored more than 50 publications on estate planning and related matters. He is also a frequent speaker at national and local estate planning seminars and institutes, including the NYU Tax Institute, the USC Tax Institute, the University of Miami Estate Planning Institute, ALI-ABA seminars, the USC Probate and Trust Institute, and the UCLA Estate Planning Institute.



SPEAKERS



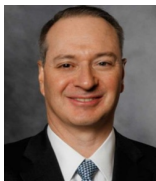
**Robert S. Keebler, CPA/PFS, MST, AEP (Distinguished)
Partner, Keebler & Associates, LLP**

Robert S. Keebler is a 2007 recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. He has been named by CPA Magazine as one of the *Top 100 Most Influential Practitioners in the United States* and one of the *Top 40 Tax Advisors to Know During a Recession*. His practice includes family wealth transfer and preservation planning, charitable giving, retirement distribution planning, and estate administration. Mr. Keebler frequently represents clients before the National Office of the Internal Revenue Service (IRS) in the private letter ruling process and in estate, gift and income tax examinations and appeals, and he has received more than 250 favorable private letter rulings including several key rulings of "first impression." He is the author of over 100 articles and columns and is the editor, author or co-author of many books and treatises on wealth transfer and taxation. Mr. Keebler has been a speaker at national estate planning and tax seminars for over 25 years including the AICPA's: Estate Planning, High Income, Advanced Financial Planning Conferences, ABA Conferences, NAPEC Conferences, The Notre Dame Estate Planning Conference and the Heckerling Estate Planning Institute and is the immediate past the chair of the AICPA's Advanced Estate Planning Conference, serving in that capacity from 2014-2020.



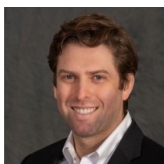
**Michaelle D. Rafferty, Shareholder
Maupin, Cox & Legoy**

Michaelle DiGrazia Rafferty ("Michaelle") is a shareholder attorney in the law firm of Maupin, Cox & LeGoy, primarily practicing in the areas of estate planning, taxation, administration of trusts and estates, and family trust company planning and operations. Michaelle also practices in trust and estate related litigation, fiduciary litigation, and tax and audit related actions. Michaelle has been admitted as a Fellow of the American College of Trust & Estate Counsel (ACTEC) where she serves as the Nevada State Chair, and is a member of the Practice and Fiduciary Litigation Committees. Michaelle recently completed her position as Chair of the Nevada State Bar - Probate & Trust Section where she served as an executive officer for the previous 8 years. She continues to be an active member of the Section's Legislative and Amicus committees for Nevada, including drafting and testifying on pending legislation before the Nevada legislature, and appearing before the Nevada Supreme Court on matters of trust and estate litigation, including actions related to Nevada asset protection trusts. She serves as the Court-appointed member of the Nevada Supreme Court's Bench-Bar Committee representing interest of trust and estate counsel. Michaelle is a founding and current Executive Officer for the Probate Bar Association of Washoe County, and has previously served as Executive Officer of the Washoe County Bar Association. She is also a long-standing member of the Northern Nevada Estate Planning Council, and is a frequent speaker and presenter for both national and state continuing education courses related to her areas of practice. Michaelle represents diverse clientele including individuals, families, entities, private and commercial trust companies, university foundations, financial institutions, private and public foundations, family offices and private family trust companies. In her free time, Michaelle can be found skiing, hiking, running, biking, or kayaking in the Sierra Nevada mountains and lakes.



**Matt Saltzman, Partner
Saltzman Mugan Dushoff**

Matthew D. Saltzman is an attorney and Managing Shareholder of the Saltzman Mugan Dushoff law firm in Las Vegas, Nevada. Over the course of his twenty-five years as a business attorney in Las Vegas, Saltzman has developed a corporate law practice focused on financial institutions and administrative law which assists financial institutions and other highly regulated businesses with corporate and regulatory compliance matters. Saltzman and his team have worked to obtain licenses for a large number of Nevada retail and family trust companies. He has testified before the Nevada legislature as an expert on trust company legislation and drafted portions of Nevada law relating to the chartering and operation of Nevada trust companies. In recent years his practice has focused on counseling trust companies that providing services related to digital assets including cryptocurrency. Matthew Saltzman received a Bachelor of Arts degree in Economics and Philosophy from the University of Wisconsin, Madison, in 1987. In 1993, he received his Juris Doctor from the University of Pittsburgh School of Law. He was also Executive Editor of the University of Pittsburgh Law Review and served as a teaching assistant for the school's Legal Research and Writing course.



**Matthew Wolf, Director Blockchain and Digital Assets
RSM US LLP**

Matthew works with banks implementing digital assets and fintechs entering the regulated space.



NEVADA PANELISTS

Natasha M. Davis, JD, LL.M, MBA, Executive Director of Client Development | Alliance Trust Company

Natasha joined Alliance Trust Company from a career in private law practice as a Tax Attorney, and as a Consultant for a national tax planning firm. Natasha has represented closely held businesses in corporate reorganizations for asset protection and tax planning strategies. She has also represented shareholder interest in business and probate litigation. She is subject matter expert in business succession planning, business tax planning, wealth planning services, including multigenerational wealth transfer and charitable tax planning. Natasha received her undergraduate and MBA degrees from National University in San Diego, her law degree from Western Michigan University Cooley Law School and her LL.M. in taxation from Thomas Jefferson School of Law, graduating Summa Cum Laude. ndavis@alliancetrustcompany.com

Thomas Monroe, JD, CTFA | Laurel Trust Company

Mr. Monroe has worked in the legal and trust industries for over 20 years. He is the President of Laurel Trust Company and serves on its Board of Directors, Trust Committee, Investment Committee and Distribution Committee. At Laurel Trust, Mr. Monroe is responsible for building and managing a Nevada retail company for ultra-high net worth clients. Mr. Monroe and the Laurel Trust team work tirelessly to provide thoughtful and solutions-oriented Trustee services for families and individuals that need a professional solution for the administration, management, and stewardship of assets. Prior to joining the Laurel Trust, Mr. Monroe was Assistant General Counsel and Senior Trust Counsel for a professional trustee company in Boston, Massachusetts. Mr. Monroe has provided stewardship for families and individuals throughout his career by providing trust, estate, philanthropic, and tax planning services, along with general family office services. TMonroe@LaurelTrust.com

Ryan Moser, CPA, Esq., President | Seven Post Trust Company

Ryan has worked in the legal and accounting industry for 12 years. He is a member of the Board of Directors of Seven Post Trust Company, a member of the Trust, Investment and Distribution Committees, a Senior Trust Officer, and serves as the corporation's President. Prior to joining Seven Post, Ryan was a tax attorney with the Nevada law firms of Holland & Hart LLP and Aguirre Riley, P.C. Prior to the practice of law, Ryan worked for the United States District Court, the Securities and Exchange Commission, and in public accounting. Ryan serves as a Trustee and the Treasurer of two Nevada non-profit organizations, The Children's Cabinet and the Nevada Agricultural Foundation. Ryan is licensed to practice law in California, Idaho, and Nevada; and is a licensed certified public accountant in Nevada. Ryan received a B.S. and M.B.A. from the University of Nevada, a J.D. from the University of Utah, S.J. Quinney College of Law, and is in the process of completing an LLM in taxation from New York University School of Law. ryan.moser@sevenposttrust.com

George Pennock, JD LL.M, MBA, Director, Trust Services Consulting | Charles Schwab Trust Company

As Director of Trust Services Consulting, I partner with Schwab's financial professionals to understand each client's complex needs regarding their estate and wealth transfer plan. I educate grantors, beneficiaries, attorneys, and tax professionals about how Schwab's personal trust services can help meet those needs, and I consult with attorneys, tax professionals, and prior trustees to facilitate a seamless transition of complex trust assets and relationships to Charles Schwab Trust Company. Charles Schwab Trust Company delivers a focused set of trust services that are designed by an investment company for investors to complement Schwab's overall wealth management capabilities. Our team of trust professionals is client-focused, professional, and committed to a high fiduciary standard, always doing what is right for you and your family. George's experience includes 10 years with Charles Schwab. He has also served as a Regional Trust Manager at Bank of the West from 2012 to 2016 overseeing the Los Angeles, Orange County, Las Vegas, Denver, Albuquerque, Cheyenne, Fargo, and Omaha Trust Offices. george.pennock@schwab.com

Ann Rosevear, Esq., President and Chief Trust Officer | Dunham Trust Company

Ann Rosevear serves as President and Chief Trust Officer (CTO) for Dunham Trust Company (DTC), providing expert structuring and administration of trusts to DTC's most complex clients. As President, Ann contributes comprehensive knowledge in trust and estate administration, asset protection and Nevada business planning, as well as overseeing the firm's adherence to fiduciary, regulatory and compliance requirements. As CTO, Ann provides highly attentive trustee services, paying particular attention to risk management issues, discretionary actions, on-going tax planning, communication with co-trustees, beneficiary needs, and professional advisor performance and dedication. She has a demonstrated understanding of trust and wealth management maintaining a well-rounded ability to work in partnership with attorneys, financial advisors and accountants in order to best serve DTC's trust clients. Prior to joining Dunham Trust Company, Ann spent 14 years as a principal attorney at Walsh, Baker, Rosevear & Loomis, P.C. in Reno, focused primarily on estate and business planning, probate, and investment and annuity transfer and underwriting, managing a multi-state practice. Ann also acted for several years as General Counsel for two Nevada-based organizations managing their corporate affairs, contracting, asset acquisition and shareholder relations. She was fortunate to begin her legal career with excellent mentorship at Marsh, Higgins, Beatty and Hatch, P.C. in Vancouver, Washington. Ann is a graduate of the University of Nevada, Las Vegas (BA. 1992) Honors College and Gonzaga University School of Law (J.D. 1996), Dean's List, Cum Laude distinction. She is also a member in good standing before the State Bar of Nevada and is licensed to practice law in Nevada. Ann.rosevear@dunham.com