



# SCHOOLS OF BANKING SCHOOL OF TRUST & FINANCIAL SERVICES



PRESENTED IN COOPERATION WITH THE WYOMING BANKERS ASSOCIATION

AUGUST 23 - 27, 2010

REGENCY LODGE - OMAHA, NEBRASKA



## WHAT YOU GAIN

The *School of Trust and Financial Services* is designed to provide attendees a broad understanding of the trust business.

Consider a few of the benefits students gain by attending this School:

- Increased understanding of all functions within the trust department
- Increased understanding of the responsibilities and liabilities inherent in the fiduciary relationship
- Understanding of basic income tax concepts for trusts and estates
- Knowledge of fundamental estate planning objectives and techniques
- Increased understanding of principal and income accounting and functions of the operations department
- New ideas and a recharged attitude after interacting with more than 40 other trust professionals
- The opportunity to learn from a seasoned faculty of trust bankers who live the subject daily
- The opportunity to expand skills and knowledge beyond on-the-job training and prepare for additional responsibilities and promotion opportunities
- An excellent foundation for continued study in the trust field, including the *Schools of Banking Advanced Trust Administration School* and/or *Advanced Trust Operations School*



## CURRICULUM

The *School of Trust and Financial Services* curriculum is a practical, hands-on learning tool designed by Midwest trust bankers. Curriculum topics include:

- Overview of the Trust Industry
- Trust Administration
- Estate Planning
- Retirement Planning
- Probate and Conservatorships
- Investments
- Overview of Fiduciary Income Taxes
- Developing Customer Relationships
- Compliance
- Trust Accounting & Securities Processing
- Senior Market Relations

Graduates can fulfill various continuing education requirements and meet prerequisites for attendance at the ABA National Graduate Trust School.



## SCHEDULE

### Schedule (tentative)

Monday	8:00 a.m. - 5:15 p.m.
Tuesday	8:00 a.m. - 6:00 p.m.
Wednesday	8:00 a.m. - 5:15 p.m.
Thursday	8:00 a.m. - 5:00 p.m.
Friday	8:00 a.m. - 11:00 a.m.

A PDF fill-in application is available at: [www.schoolsofbanking.com](http://www.schoolsofbanking.com)



## WHO SHOULD ATTEND

This School provides broad trust instruction appropriate for:

- New trust department personnel (a minimum of six months trust experience 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 reemphasizing a trust department
- Experienced trust professionals wishing to update their trust knowledge and skills



## ADMISSION & ENROLLMENT INFORMATION

To register, please complete and fax or e-mail the registration form below to the Schools of Banking at (402) 474-2148 or [schools@nebankers.org](mailto:schools@nebankers.org). **Registration deadline is July 23.** You may also access [www.schoolsofbanking.com](http://www.schoolsofbanking.com) and submit the **PDF fill-in application form**. Your bank will be invoiced for the applicable fee:

**\$1,350 Single Housing**  
**\$1,250 Double Housing**  
**\$1,150 No Housing**

This fee includes registration, instruction, all classroom materials, four nights lodging (if applicable), breakfasts, lunches, breaks and a pizza dinner. Priority registration is given to members of sponsoring or partnering State Banking Associations. **Nonmembers of their State Banking Association must pay an additional administrative fee of \$575 and are not guaranteed admission.**



## FACULTY

*Holly Butson*  
Berwyn, Pennsylvania

*Michelle Feit*  
Lincoln, Nebraska

*Terri Thomas*  
Topeka, Kansas

*Nolan Brohaugh*  
Topeka, Kansas

*Thomas Gaughen*  
Omaha, Nebraska

*Jim Bush*  
Hiawatha, Kansas

*KC Mathews*  
Kansas City, Missouri

## REGISTRATION FORM

- Please register me for the *School of Trust & Financial Services*
- Single Housing - \$1,350     Double Housing - \$1,250     No Housing - \$1,150

*For Office Use Only*  
 PDF Ackn.

Name: \_\_\_\_\_ Last 4-Digits of Soc. Sec. #: \_\_\_\_\_

Bank/Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Bank/Company P.O. Box: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ E-mail: \_\_\_\_\_

*(all confirmations will be made via e-mail)*

**Mail your registration and fee to Schools of Banking at PO Box 80008, Lincoln, NE 68501-0008. Please call Schools of Banking at (402) 474-1555 with specific questions. Deadline is July 23.**

♦Fax: (402) 474-2148    ♦E-Mail: [schools@nebankers.org](mailto:schools@nebankers.org)    ♦Web: [www.schoolsofbanking.com](http://www.schoolsofbanking.com)



**Schools of Banking**



*Cosponsored by the Kansas and Nebraska Bankers Associations and the Iowa and Kansas Trust Associations.*

*In partnership with the Colorado, Minnesota, Missouri, North Dakota, South Dakota and Wyoming Bankers Associations.*

*This institution does not discriminate with regard to race, creed, color, sex, age, religion or national origin.*