



SCHOOLS OF BANKING SCHOOL OF TRUST & FINANCIAL SERVICES



PRESENTED IN COOPERATION WITH THE NORTH DAKOTA 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



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. **Registration deadline is July 23. You may also access 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

Nolan Brohaugh
Topeka, Kansas

Jim Bush
Hiawatha, Kansas

Michelle Feit
Lincoln, Nebraska

Thomas Gaughen
Omaha, Nebraska

KC Mathews
Kansas City, Missouri

Terri Thomas
Topeka, Kansas

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 ♦Web: www.schoolsofbanking.com



Schools of Banking

NBA



*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.*