

2025 Tri-State Trust CONFERENCE

April 22-24, 2025
Delta Hotel by Marriott
Fargo, ND

EXHIBITORS & SPONSORS

AGENDA

As of April 15, 2025

American Cancer Society
Broadridge
Cannon Financial Institute
CAPIS
Cheetah
Compliance Alliance
EPIC Retirement Plan Services
Farmers National Company
FGI Advisors
Federated Hermes
FIS
Fi-Tek
Franklin Templeton
FusionIQ
Infovisa
IntraFi
John Hancock
JP Morgan
MainStreet Advisors
MineralTracker
Monroe Capital
National Care Advisors
ND Community Foundation
Northern Trust
Peoples Company
Pifer's Auction & Realty
Proxytrust
Ritchie Bros.
Simplify ETFs
Steffes Group
T. Rowe Price
Trustate Corporation
UMB Bank
Vanguard

Tuesday, April 22

4:30 - 6:30 pm Registration
5:00 - 6:30 pm Opening Reception in Exhibit Hall
6:30 - 7:00 pm Opening Dinner
7:00 - 7:50 pm **No Bad Days**
Hunter Pinke, Northwood ND

Wednesday, April 23

7:45 am Breakfast Buffet in Exhibit Hall
8:30 am **Welcome and Introduction of Exhibitors Group 1**
8:30 am **Economic Outlook**
Lauren Henderson, Stifel Financial, Chicago IL
9:30 am **Using J.P. Morgan's Guide to Retirement to Help Clients Retire with Confidence**
Sharon Carson, JP Morgan Chase, New York NY
10:30 am Morning Break in Exhibit Hall
11:05 am **Hot Fiduciary Compliance Topics for Trustees**
Patrick Alyward, TrustWorthy Consultants, Atlanta GA
11:55 am **Introduction of Exhibitors Group 2**
12:00 pm Luncheon in Exhibit Hall
1:00 pm **Introduction of Exhibitors Group 3**
1:05 pm **Scouting Report on Recent Tax-Related Estate Planning Developments**
Steve Murphy, McGuireWoods LLP, Richmond VA
2:30 pm Dessert and Final Break with Exhibitors | Door Prize Drawings
3:10 pm **A.I. in Wealth Trust: Developing the Use Cases**
Mike Tropeano, Fi-Tek, Boston MA
4:15 pm **Rapid-Fire Roundtables**
5:00 pm Networking Reception followed by Dinner on Your Own

Thursday, April 24

7:45 am Continental Breakfast
8:15 am **Thriving in Chaos: Addressing 7 Challenges Impacting Wealth Management**
Phil Buchanan, Cannon Financial Institute, Athens GA
9:15 am Morning Break
9:30 am **BSA/AML/OFAC Compliance Essentials for Fiduciaries**
Jeff Kropschot, Kropschot Consulting Partners, Springville UT
10:30am **Global Market Outlook**
Chris Dillon, T. Rowe Price, Port Deposit MD
11:30 am Closing and Adjourn



NORTH DAKOTA
BANKERS
ASSOCIATION