

# 2026 Tri-State Trust CONFERENCE

April 27-29, 2026

Holiday Inn of Fargo  
Fargo, ND

## EXHIBITORS & SPONSORS

## AGENDA

*Ascensus*  
*Broadridge*  
*Cannon Financial Institute*  
*CAPIS*  
*Cheetah*  
*Compliance Alliance*  
*Epic Retirement Services*  
*Estateably*  
*Farmers National Company*  
*Federated Hermes*  
*Fifth Third Institutional Services*  
*FIS*  
*Fi-Tek*  
*Hertz Farm Management*  
*Infovisa*  
*Intrafi*  
*J.P. Morgan Asset Management*  
*MainStreet Advisors*  
*Manulife John Hancock Investments*  
*MineralTracker*  
*National Care Advisors*  
*North Dakota Community Foundation*  
*Omnitech, Inc.*  
*Pifer's Auction and Realty*  
*Proxytrust*  
*Simplify ETFs*  
*SS&C Black Diamond Wealth Solutions*  
*Steffes Group*  
*Superior IRA & HSA*  
*T. Rowe Price*  
*Touchstone Investments*  
*Trust Investment Solutions*  
*UMB*  
*Vanguard*

### Monday, April 27

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 **They Might Not be Crazy: Working with People You Disagree With (And Might Not Even Like)** - Dallin Cooper

### Tuesday, April 28

7:45 - 8:30 am Breakfast Buffet in Exhibit Hall  
8:30 - 9:30 am **J.P. Morgan's Retirement Planning Essentials**  
Sharon Carson, JP Morgan Asset Management  
9:30 - 10:00 am Morning Break in Exhibit Hall  
10:00 - 11:30 am **Federal Tax Update 2026: Key Developments & Emerging Issues**  
Sam Donaldson, Georgia State University  
11:30 am - 12:10 pm **Rapid-Fire Roundtables**  
12:10 - 12:15 pm **Introduction of Exhibitors and Sponsors: Group 1**  
12:15 - 1:10 pm Luncheon in Exhibit Hall  
1:10 - 1:15 pm **Introduction of Exhibitors and Sponsors: Group 2**  
1:15 - 2:05 pm **The Impact of Artificial Intelligence and Digital Assets on Wealth Management** - Mike Tropeano, Fi-Tek  
2:05 - 2:35 pm Dessert and Final Break with Exhibitors | Door Prize Drawings  
2:40 - 3:30 pm **Demystifying Direct Indexing**  
Alex Urbani, MainStreet Advisors  
3:30 - 3:40 pm Break  
3:40 - 4:40 pm **CCA 202352018: What Every Fiduciary Needs to Know About the Most Consequential IRS Decanting Guidance in Decades** - Dan Gespass, Andersen  
4:45 - 6:00 pm Networking Reception followed by Dinner on Your Own

### Wednesday, April 29

7:45 - 8:15 am Continental Breakfast  
8:15 - 9:05 am **Global Market Environment**  
Kelly Hammond, T. Rowe Price  
9:05 - 9:15 am Break  
9:15 - 10:05 am **Irrevocable Trust? A Discussion on Modification and its Implications**  
F. John Williams III, Fredrikson, and Chantal Stennerson, Eide Bailly  
10:05 - 10:15 am Break  
10:05 - 11:15 am **The Billion Dollar Blind Spot**  
Phil Buchanan, Cannon Financial Institute