

PERSONAL TRUST GRADUATE

Curriculum

Advanced Estate Planning Techniques and Cases
Fiduciary Law Update
Gift Tax and Estate Tax Update
Generation Skipping Transfer Tax Issues
Policies, Procedures, and Operational Risks
Advanced Investments
Principal and Income Law Update
QRP and IRA Distribution Risks and Update
Advanced Charitable Planning

Personal Trust Graduate School covers material related to effectively managing personal trust accounts, including updates on fiduciary duties and liabilities, tax law changes, rulings and opinions. Participants will come away with in-depth knowledge of the latest developments to ensure proper risk management, provide accurate administration and information, and maintain and enhance their standing as a valuable resource to their clients.

This course is designed for repeated attendance every few years to stay on top of today's complex and ever-changing financial services environment. Join us and interact with your peers and a professional staff of industry veterans for a highly beneficial learning experience.

Who Should Attend

- Experienced personnel seeking continuing education credit hours for the CTFA™
- Graduates of Cannon Trust School
- Graduates of other accredited trust schools
- Trust Department Managers with 5 or more years in Trust Administration
- Officers with eight years trust and estate administration experience who have or are being prepared for management responsibilities

Class Schedule

Registration and orientation take place on Sunday afternoon and class begins on Monday at 8:00 AM. The one-week session closes on Friday at 3:00 PM. Attendance is mandatory at all sessions.

Key Benefits

- Relevant and current coverage of trust issues, including tax, case law, investment and regulations facing trust professionals in today's competitive marketplace
- Opportunity to network with other seasoned trust professionals and faculty members for exposure to other ideas and cultures
- Participants will gain valuable advanced technical management skills in this fast-paced one-week session
- Completion certificate evidencing the qualified hours of training received
- Qualifies for Banker Education Hours by the Institute of Certified Bankers (ICB)

COURSES



LOCATIONS



Myrtle Beach, SC

REGISTER

COURSES

Faculty

Donna Gardner Schumell

Cannon Financial Institute
Milwaukee, WI

Fran M. DeMaris

Executive Vice President
Cannon Financial Institute
Champaign, IL

Roy M. Adams

Managing Member
Roy M. Adams & Associates PLLC,
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Duane E. Lee, II

Executive Vice President
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Athens, GA