

2023

WEALTH MANAGEMENT & TRUST CONFERENCE & EXHIBITION

📅 Dec. 3-5, 2023

📍 Hershey Lodge & Convention Center, Hershey, Pa.

💰 M: \$500 | AM: \$675 | NM: \$750



Attendees will hear updates on trends and issues, learn from seasoned professionals and industry experts, and explore exhibitor resources.

TOPICS

- **Economic and Market Outlook: It All Depends on Your Time Horizon** - Linda Duessel, CFA, CPA, CFP, Federated Hermes
- **Resilient Business in a Time of Uncertainty** - Paul Lally, Wipfli, LLP
- **Understanding Discretionary Distributions** - Nora Gieg Chatha, Esq., Tucker Arensberg P.C.
- **Charitably Minded: What Giving Vehicle Is Right for Your Clients?** - Ryan Alexis, SS&C Innovest
- **Elder Law** - Marielle Hazen, Hazen Law Group
- **The Impact of Demographics** - Malcolm Polley, Stewart Capital
- **Regulatory Update** - Nora Gieg Chatha, Esq., Tucker Arensberg P.C.
- **Secure Act** - Brad Campbell, Faegre Drinker Biddle & Reath LLP
- **Fixed Income in the New Rate Environment** - Dan Larkin, Vanguard
- **Demystifying AI: A Guide for Bank Leaders** - Jack Vonder Heide
- **And More!**

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