

2024 WEALTH MANAGEMENT & TRUST CONFERENCE & EXHIBITION

📅 Sept. 15-17, 2024

📍 The Hotel Hershey, Hershey, Pa. -- NEW LOCATION

💰 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. This program is approved for 8 CPE credits and has been submitted for CFP and CTFA credits.

TOPICS

- **Economic and Market Outlook: It All Depends on Your Time Horizon** - Linda Duessel, CFA, CPA, CFP, Federated Hermes
- **Engaging Business Owners in the Transition Discussion** - Paul Lally, Wipfli, LLP
- **Corporate Transparency Act** - Nora Gieg Chatha, Esq., Tucker Arensberg P.C.
- **Digital Assets** - Michelle Doyle, Federated Hermes
- **Discretionary Distributions** - Vicky Ann Trimmer, Esq., Daley Zucker Attorney at Law
- **Regulatory Update** - Nora Gieg Chatha, Esq., Tucker Arensberg P.C.
- **Unlocking Opportunities: Navigating the Latest IRA Updates in 2024** - Joseph Cicchinelli, Pension Management Company
- **Special Needs Trusts** - Dennis McAndrews, Esq., McAndrews Law
- **AI Best Practices for Wealth Management** - Jack Vonder Heide, Technology Briefings Centers, Inc.
- **And More!**

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