

2025 WEALTH MANAGEMENT & TRUST CONFERENCE & EXHIBITION

📅 Oct. 5-7, 2025

📍 The Hotel Hershey, 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

- **Uncertainty and General Market Update** - Karen Manna, Federated Hermes
- **Regulatory Panel** - Moderator: TBD; Panelists: Carter Frantz, PA Department of Banking and Securities, William Wisser, Federal Reserve Bank of Philadelphia, and Todd Abrams, Office of the Comptroller of Currency
- **Auditing of Trust Companies and Bank Trust Companies** - Josh Will, CFIRS, Cherry Bekaert
- **Directed Trustee Laws Rules** - Patti S. Spencer, Esquire, Spencer Law
- **Special Needs Trust** - Dennis McAndrews, McAndrews, Mehalick, Connolly, Hulse and Ryan
- **Regulatory Update** - Nora Gieg Chatha, Esquire, Eckert Seamans Cherin & Mellott, LLC
- **Tax & Case Law Update** - Nora Gieg Chatha, Esquire, Eckert Seamans Cherin & Mellott, LLC
- **Elder Law** - TBD
- **AI** - Joe McMann, Artificial Intelligence Risk, Inc.

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