

2017 Wealth Management Conference

NOVEMBER 2-3, 2017

8:30 A.M. - 4:15 P.M.

HILTON HOTEL • JACKSON, MS

Schedule of Events

Thursday, November 2

- 8:30 am **Registration and Continental Breakfast**
Sponsored by Broadridge Financial Solutions
- 9 – 9:15 am **Welcome** – Kathryn Merrell, MBA Trust Committee Chairman
Trustmark National Bank, Jackson
- 9:15 – 9:45 am **State Update**
Political Official invited
- 9:45 – 10:15 am **Coffee and Conversation - sponsored by Amada Senior Care Exhibits Open**
- 10:15 – 11:30 am **Trust Sales**
Tony Fadool, Federated Investors
- 11:30 am – 1 p.m. **Luncheon** – Jerry Host, MBA Chairman, Trustmark National Bank
Sponsored by Crews & Associates
- 1 – 1:30 p.m. **Exhibits Open**
- 1:30 – 2:45 p.m. **Shattered Trust: Mismanagement, Greed, and Betrayal**
Donna Ingram, Forensic Accountant, Donna M. Ingram Accountant
- 2:45 – 3 p.m. **Coffee and Conversation** – Sponsored by Brunini, Grantham, Grower & Hewes
Exhibits Open
- 3 – 4:15 p.m. **Breakout Sessions**
a) Handling Tangible Property During Estate & Trust Administration
Benny Taylor, Taylor Auction & Realty
b) Retirement Plan
Don Goode, Young Wells
- (meet in Lobby at 5:45 pm if you need a ride or would like to follow)
- 6 p.m. **Cocktails and Dinner - Fairview Inn**
Taylor Auction and Realty to sponsor cocktails
Federated Investors to sponsor dinner

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Schedule of Events Continued

Friday, November 3

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| 8 a.m. | Continental Breakfast
Exhibits Open |
| 8:30 – 9:45 a.m. | Washington Update
Phoebe Papageorgiou, American Bankers Association |
| 9:45 – 10 a.m. | Coffee and Conversation
Sponsored by Watkins & Eager
Exhibits Open |
| 10 – 11:15 a.m. | Economic and Market Outlook
Wil Tustin, Federated Investors |
| 11:15 a.m. | Business Session and Door Prizes |
| 11:30 a.m. | Adjourn |

MBA Trust Committee:

- *Kathryn Merrell, Trustmark National Bank, Jackson
- *Evelyn Agent, First Commercial Bank, Jackson
- *David Cleland, BankPlus, Ridgeland
- *Larry Cantrell, Cadence Bank, NA, Columbus
- *Richard Crowder, Regions Bank, Jackson
- *John Davis, Cadence Bank, Starkville
- *Lee Gill, Regions Bank, Hattiesburg
- *Ann Guice, The Peoples Bank, Biloxi
- *Jack McFerrin, BancorpSouth, Tupelo
- *Danny McHale, Trustmark National Bank, Jackson
- *Terry Mobley, BancorpSouth, Jackson
- *Whitney Reynolds, Renasant Bank, Columbus
- *Anthony Sherman, Trustmark National Bank, Jackson
- *Tom Wicks, The Peoples Bank, Biloxi
- *Allison Youngblood, Renasant Bank, Columbus

Who Should Attend?

- CEOs
- Trust Officers
- Trust Personnel

Exhibitors

Broadridge Financial
Services

Crews & Associates

Federated Investors

ProxyTrust

RIC (Resource
Insurance
Consultants)

Taylor Auction &
Realty

Registration Information

- **MBA Members:** \$200 per registrant
- **Non-Members:** \$400

Registration fees include instruction, refreshment breaks and lunch. Hotel reservations are NOT included in registration fees.

Cancellation Policy

Full registration fees will be refunded if a cancellation is received on or before October 27, 2017. After that date, a \$50 processing fee will be retained. No refunds will be granted for cancellations made the day of the conference. Substitutions are welcome at no charge.

Hotel Information

Conference will be held at the Hilton Hotel in Jackson. A link for reservations can be found on our website, www.msbankers.com. Please reference the Mississippi Bankers Association when making your reservation to get the special rate of \$126 until October 2. The attendee is responsible for room payment including taxes and expenses.

More Information

Dress for the workshop is business casual. We recommend that you bring a light sweater or jacket in the instance the room is cool. Registration will begin at 8:30 a.m. on Thursday, November 2. If you need additional information, please contact Lori at the MBA Office by calling 601-948-6366 or by emailing lrichardson@msbankers.com



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PLEASE DUPLICATE FORM FOR EACH REGISTRANT

BANK/COMPANY NAME: _____

REGISTRANT NAME: _____

BANK ADDRESS: _____

PHONE NUMBER: _____

CELL PHONE NUMBER: _____

EMAIL ADDRESS: _____

(SEE REGISTRATION INFORMATION ABOVE FOR FEE BREAKDOWN)

\$200 FOR MBA MEMBER REGISTRATION

\$400 FOR NON-MEMBER REGISTRATION

Each individual registration will receive a confirmation of registration via email or fax. Please contact the MBA at (601) 948-6366 if you do not receive a confirmation within 48 hours.

TO REGISTER: Scan & Email to lrichardson@msbankers.com.

We would like to take this time to recognize our MBA PROGRAM PARTNERS, listed below, that provide support to the MBA for a wide-range of events throughout the year. Please take a moment to thank representatives of these companies when you get the chance!



2017 Mississippi Bankers Association *Program Partners*



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