

THE MBA TRUST COMMITTEE PRESENTS

2018 Wealth Management Conference

November 1—8: 30 am—4: 15 pm

November 2—8 am—11: 30 am

HILTON HOTEL • 1001 E. COUNTY LINE RD. • JACKSON, MS • 000-000-0000

SCHEDULE

Thursday, November 1

- 8: 30 am Registration and Continental Breakfast
- 9 - 9: 15 am Welcome - Allison Youngblood, Renasant Bank, Columbus
MBA Trust Committee Chairman
- 9: 15 - 9: 45 am Political Update - Glenn McCullough, MS Development Authority, Jackson
- 9: 45 - 10: 15 am Coffee and Conversation/Exhibits Open
- 10: 15 - 11: 30 am Tax Update - Bill Brown, Baker Donelson, Jackson
- 11: 30 am - 1: 30 pm Luncheon/Exhibits Open (1 - 1: 30 pm)
- 1: 30 - 2: 45 pm Marketing to Millennials - John Oxford, Renasant Bank, Tupelo
- 2: 45 - 3 pm Coffee and Conversation/Exhibits Open
- 3 - 4: 15 pm Breakout Sessions
A) Land, Gas, & Oil
Ken Booker, Bob Morgan, Eddy Waller - Regions Bank, Jackson
B) Employee Benefits
Jane Armstrong - Phelps Dunbar, Jackson
- 6 pm Cocktails & Dinner at Fairview Inn
(meet in Lobby at 5: 45 pm if you need a ride or would like to follow someone)

2018 WEALTH MANAGEMENT CONFERENCE

Friday, November 2

8 am	Continental Breakfast/Exhibits Open
8:30 - 9:45	Federated Speaker—Linda Dussel Federated Investors, Pittsburg, PA
9:45 -10 am	Coffee and Conversation/Exhibits Open
10 - 11:15 am	Washington Update Phoebe Papageorgiou, ABA, Washington DC
11:15 am	Business Session and Door Prizes
11:30 am	Adjourn

MBA TRUST COMMITTEE

Allison Youngblood, Renasant Bank, Columbus, Chairman
Evelyn Agent, First Commercial Bank, Jackson
Danny Bass, The Peoples Bank, Biloxi
David Cleland, BankPlus, Ridgeland
Richard Crowder, Regions, Jackson
John Davis, Cadence Bank, Starkville
Catherine Fitzpatrick, Renasant Bank, Tupelo
Ann Guice, The Peoples Bank, Biloxi
Jack McFerrin, BancorpSouth, Tupelo
Danny McHale, Trustmark National Bank, Jackson
Kathryn Merrell, 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

WHO SHOULD ATTEND

CEOs

Trust Officers

Trust Personnel

EXHIBITORS

(as of this print)

- American Cancer Society
- Broadridge Financial Solutions
- Federated Investors
- Proxtytrust
- RIC (Resource Insurance Consultants)

SPONSORS

(as of this print)

- American Cancer Society
- Broadridge Financial Solutions
- Butler Snow
- Federated Investors
- Proxtytrust
- RIC (Resource Insurance Consultants)



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.

Hotel Information

Conference will be held at the Hilton Hotel in Jackson. Please call 601-957-2800 to make reservations. Please reference the Mississippi Bankers Association when making your reservation to get the special rate of \$128 until October 15. The attendee is responsible for room payment including taxes and expenses.

Cancellation Policy

Full registration fees will be refunded if a cancellation is received on or before October 25, 2018. 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.

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 am on Thursday, November 1.** If you need additional information, please contact Lori Richardson, lrichardson@msbankers.com or 601-948-6366.



**2018 Wealth Management Conference
November 1-2, 2018**

PLEASE DUPLICATE FORM FOR EACH REGISTRANT

BANK/COMPANY NAME: _____

REGISTRANT NAME: _____

BANK ADDRESS: _____

PHONE NUMBER: _____

CELL NUMBER: _____

EMAIL ADDRESS: _____

(SEE REGISTRATION INFORMATION ABOVE FOR FEE BREAKDOWN)

\$200 FOR MBA MEMBER REGISTRANT

\$400 FOR NON MEMBER REGISTRANT

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

QUESTIONS: Contact Lori Richardson, lrichardson@msbankers.com or 601-968-6366

The Mississippi Bankers Association 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!

For more information about Program Partners, contact
Brooke McCoy, MBA marketing manager, bmccoy@msbankers.com