

**Florida Trust & Wealth Management School
July 21-26, 2024
Freshman Year Schedule**

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TIME	July 21 SUNDAY	July 22 MONDAY	July 23 TUESDAY	July 24 WEDNESDAY	July 25 THURSDAY	July 26 FRIDAY
8:00 - 9:45 AM		Chapters 736 & 738: A Primer RANDY POPE	Bank Fiduciary & Estate/Gift Tax Law LESTER LAW	Investment Management PERRY LONG	Basic Retirement Planning MARK PARTHEMER	Exam 8:00 - 10:00 AM
9:45 - 10:00 AM		BREAK	BREAK	BREAK	BREAK	BREAK
10:00 - 11:45 AM		Personal Trust Basics RANDY POPE	Bank Fiduciary & Estate/Gift Tax Law LESTER LAW	Investment Management PERRY LONG	Case Study in Planning CANDANCE MARSHALL/NIKKI PACKER/KAREN MCCRAE LEE FATT	Graduation 10:30 - 11:00 AM
11:45-12:45 PM		LUNCH	LUNCH	LUNCH	LUNCH	
12:45 - 2:30 PM		Personal Trust Basics RANDY POPE	Basic Financial Planning DAVID TORRE	Estate Administration & Basic 706 HUGH DOERR	Discretionary Distributions BURNS DOBBINS	
2:30 - 2:45 PM		BREAK	BREAK	BREAK	BREAK	
2:45 - 4:30 PM	REGISTRATION 5:00 - 5:30 PM	Fiduciary Liability & Ethics ADAM GOLDBERG	Basic Financial Planning DAVID TORRE	Estate Administration & Basic 706 HUGH DOERR	Regulations & Risk Management DARRYL GORDON	

5:30 - 5:45 PM	FRESHMAN ORIENTATION	Attendance at Freshman Orientation, Class Pictures and Banquet is required
5:30 - 6:00 PM	Class Pictures	
6:00 PM	Welcome Banquet	

Attendance at Graduation is requested
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