

64<sup>TH</sup> ANNUAL  
**FLORIDA  
TRUST & WEALTH  
MANAGEMENT  
SCHOOL**  
JULY 21-26, 2024



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FLORIDA BANKERS ASSOCIATION



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# FLORIDA TRUST & WEALTH MANAGEMENT SCHOOL

JULY 21-26, 2024

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## 64<sup>th</sup> Annual Florida Trust & Wealth Management School

The Florida Trust and Wealth Management School is a nationally renowned three-year program encompassing the world of trust and wealth management banking. The establishment, structure, purpose and general activities of a typical trust and wealth management department are discussed.

The curriculum is designed to give students a well-rounded and practical understanding of the trust and wealth management industry. The school curriculum covers administration of estates and trusts, and offers specialized topics on pertinent issues affecting the trust and wealth management professionals.

Students completing the three-year program will receive an excellent education, equipping them to be a contributing member of the trust and wealth management planning team within their organization. This school remains current, relevant, and flexible, as attested by 2,000 graduating students, and continues to offer excellence in education and career training!



### HOTEL INFORMATION

Call the hotel and identify yourself with the FBA 65<sup>th</sup> Annual Trust & Wealth Management School for the \$175 room rate.

July 21 – July 26, 2024

Rosen Shingle Creek

9939 Universal Blvd, Orlando, FL 32819

Tel. (407) 996-9939 | Reservations: (800) 996-6338

Please make your reservations before 5:00 p.m. on Wednesday, June 19, 2024

## MEET OUR TEAM



### Amy Hale

School Director,  
Senior Class Director  
Managing Director – FL & GA  
BMO Wealth Management



### Burns Dobbins

Junior Class Director,  
SVP, Fiduciary Officer  
Bessemer Trust



### Karen McCrae-Lee Fatt

Freshman Class Director,  
SVP, Senior Trust Manager  
Truist Wealth



### Karen Nolan, Esq.

Associate Class Director,  
SVP, Director of Fiduciary Services  
Seacoast Bank



### Marilyn Matherne

Director of Education  
Florida Bankers Association



### Olga Williams

School Registrar  
Professional Development  
Coordinator,  
Florida Bankers Association



### WHO SHOULD ATTEND?

The conference is designed for Trust & Wealth Management professionals, Private Bankers, Trust Administrators, Financial Advisors and other related roles at all levels.

CONTACT: Olga Williams

Tel: (850) 701-3501

E: [ojwilliams@floridabankers.com](mailto:ojwilliams@floridabankers.com)

Register Online: [www.floridabankers.com](http://www.floridabankers.com)

## WHO SHOULD ATTEND

- Trust & Wealth Management Professionals vs. Administrative Assistants
- Private Bankers
- Investment Professionals
- Business Development Officers
- Legal Assistants
- Trust Administrators
- Financial Advisors

## ADMISSION REQUIREMENTS

There are no prerequisite for this program. All incoming freshman students into the 2024 summer session will be required to complete all three years of the program to graduate. The registrar and school board of directors will decide on all applications for admission should there be any questions regarding the application.

## BENEFITS OF ATTENDING THE SCHOOLS

- Curriculum is designed to help students prepare for the CTFA exam. You can earn CTFA & CLE Continuing Education credits.
- Florida based curriculum taught by Florida based instructors to Florida based trust and wealth management professionals.
- Minimal travel expense and much lower registration fees compared to the majority of other trust and wealth management schools.
- Graduates of the program will be able to sit for the CTFA exam after completion of the ABA online exam prep.

**Registration:** Registration is a simple online process and can be found on the school web-page of the FBA website. Fees include lunch each day, curriculum and digital educational materials. Registration is between the hours of 4:00 p.m. and 5:00 p.m. on Sunday, July 21, 2024 at The Rosen Shingle Creek in Orlando. Students must arrive either before or during the registration period to check-in to the hotel, register for the school and attend the required Sunday evening banquet.

**Cancellations:** Any cancellations 2-4 Weeks prior to this school will be refunded minus a \$400 processing fee. There are no refunds or credits for cancellations within two (2) weeks of this event, or failing to appear at the school. Cancellations must be submitted in writing.

## GENERAL INFORMATION

**Grades and Final Examinations:** Closed-book examinations, based on lectures and questions submitted by the faculty, will be given to all students. Final exam grades will be sent to each student and their nominating officer. Final exam grade and each Home Study Problem for the school must receive a grade of 70 or above for satisfactory completion. The exam and Home Study Problems overall average must also be 70 or above to graduate.

At the completion of your final year at the school, we will mail you an official transcript letter with your grades to the address you listed on your application. Should you need an additional copy for your employment records, you may request a letter by contacting the school registrar.

**Attire:** The School is conducted in an informal workshop atmosphere. Casual clothes are recommended for wear throughout the week. Classrooms are air-conditioned so you should bring appropriate clothing.

**Attendance Requirements:** Students must be prepared to participate at all school functions from the banquet on Sunday, July 21st through the exam and graduation on Friday, July 26th. Students are expected to attend all sessions, complete the required work including all home study problems and participate in the final examination.

**Graduation:** Graduation will be on Friday morning, July 26th at The Rosen Shingle Creek Attendance is required of all Trust & Wealth Management School students.

**Code of Ethics and Conduct:** The Florida Bankers Association (FBA) and the Florida Trust & Wealth School (FTS) recognize that it takes more than quality education and a commitment to the bankers that it serves to be successful in accomplishing our mission. We rely heavily on our solid reputation for honesty, fairness and ethical conduct to attract our students, recruit quality instructors and retain the high level of bank support and respect that we have worked so hard to achieve. Our reputation ultimately rests on the good judgment and personal integrity of everyone – staff, students, instructors, and all other individuals and organizations who are involved with the FBA. Any variance from the standards established by this code shall be unacceptable.

**Tuition:** As a reminder, if students register on or before March 21, 2024, you will receive a \$200 discount as reflected in the pricing below:

| <u>REGISTRATION FEES</u> | <u>BEFORE</u><br><u>3/21</u> | <u>AFTER</u><br><u>3/22</u> |
|--------------------------|------------------------------|-----------------------------|
| FBA Members              | \$1,695                      | \$1,895                     |
| Non-FBA Member           | \$3,790                      | \$3,790                     |

**Hotel/Housing:** All students are required to make and pay for their own sleeping room reservations, which will allow each institution to decide on single or double occupancy. It is recommended by the School that students stay at The Rosen Shingle Creek for close proximity to the School and classrooms. It is however, the student's final decision as to where to make their lodging accommodations.

**Meals:** Lunch is provided for the entire week. The Sunday banquet will be the only dinner meal offered. Breakfast and dinner are not provided Monday through Friday. There will be two refreshment breaks each day, Monday through Thursday, and one provided on Friday. The first meal will be the Sunday evening banquet, July 21<sup>st</sup>, and the last meal will be lunch on Thursday, July 25<sup>th</sup>.

**Faculty:** Selected trust officers, prominent university faculty and attorneys are utilized at all levels of the School. Through education and experience all members of the Florida Trust and Wealth Management School faculty have gained a special competence for relating their subject areas in practical and meaningful ways to the students.

