66TH ANNUAL

FLORIDA TRUST & WEALTH MANAGEMENT SCHOOL

JULY 12-17, 2026
RENAISSANCE RESORT & SPA, DISNEY SPRINGS
ORLANDO, FLORIDA

The Florida Trust & Wealth Management School is a nationally respected, three-year educational program designed to prepare banking professionals for leadership roles in trust and wealth management. With a curriculum rooted in real-world application, the program provides a deep and practical understanding of fiduciary principles, estate and trust administration, investment management, and evolving industry regulations.

Each year, students gain hands-on knowledge from experienced instructors, connect with peers across the state, and build the expertise needed to become key contributors to their institution's wealth management team. With over 2,000 graduates to date, this program continues to deliver industry-relevant training that meets the needs of today's trust professionals—right here in Florida.

REGISTER NOW

Trust & Wealth Management

A DIVISION OF THE FLORIDA BANKERS ASSOCIATION

THE CURRICULUM

FRESHMEN	JUNIORS	SENIORS
Chapter 736 & 738: A Primer	Estate & Gift Tax	Advanced Personal Financial Planning
Personal Trust Basics	GST Tax	Business Succession Planning
Fiduciary Liability & Ethics	Risk Management & Insurance Solutions	Special Needs Trust
Bank Fiduciary & Estate/Gift Tax Law	Retirement Planning	Advanced Estate Planning
Basic Financial Planning	Estate Planning Document Analysis	Advanced Trust/Estate Administration
Investment Management	Individual & Fiduciary Income Taxation	Advanced Personal & Professional Development
Estate Administration & Basic 706	Investment Management	Credit Solutions for the Fiduciary
Basic Retirement Planning	Charitable Planning	Advanced Investment Management
Case Studies in Planning		Advanced Retirement Planning
Discretionary Distributions	Case Studies in Intermediate Planning	Case Studies in Advanced Planning
Regulations & Risk Management		

WHY ATTEND? KEY BENEFITS

- **CTFA & CLE Credit Opportunities:** The curriculum is designed to offer CTFA and CLE continuing education credits. Based on last year's identical curriculum, participants received 33.5 CLE hours, 29.5 CTFA hours, and 11.5 CRSP hours. Continuing Education credits are subject to annual approval.
- **Locally Focused, Expert-Led:** Courses are tailored to the Florida market and taught by experienced, Florida-based instructors who understand the unique regulatory and client landscape.
- **Cost-Effective Professional Development:** Enjoy significantly lower tuition and travel costs compared to most national trust and wealth management programs—without sacrificing quality.
- **CTFA Exam Readiness:** Graduates of the program are provided valuable preparation for the CTFA exam when combined with the ABA Online Exam Prep.

MEET OUR TEAM

DIRECTORS & STAFF:

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

Karen McCrae-Lee Fatt
Senior Class Director
SVP, Senior Trust Manager
Truist Wealth

Karen Nolan. Esq
Junior Class Director
SVP, Director of Fiduciary Services
Seacoast Bank

David D. Frye
Freshman Class Director
Vice President, Private Wealth Advisor – Trust
FineMark National Bank & Trust

Jen Williams
Associate Director
SVP, Senior Trust Officer
Bank of America

Olga Williams
School Administrator
Director of Education & Events
Florida Bankers Association

Melanie Motiska
School Registrar
Education Manager
Florida Bankers Association

WHO SHOULD ATTEND?

This program is designed for financial professionals looking to deepen their expertise in trust and wealth management. Ideal attendees include:

- Trust Officers & Wealth Management Professionals
- Private Bankers
- Investment Professionals
- Business Development Officers
- Trust Administrators
- Legal and Fiduciary Assistants
- Financial Advisors

PLAN YOUR TRIP

2026 Registration Fee:

FBA Member Institution:
Early-Bird Rate: $1,945 | Regular: $2,145
Early-Bird Cutoff: March 16, 2026

Non-Member Institution: $4,290

Registration:
Students may register on the FBA website. Fees include lunch each day, curriculum and digital educational materials. Students must arrive before or during the registration period to check-in to the hotel, register for the school and attend the required Sunday-evening banquet.

Register Here

GENERAL INFORMATION

Grades and Final Examinations:

Students will take closed-book examinations, based on lectures and questions submitted by faculty. Final exam grades will be sent to each student and their nominating officer. For satisfactory completion, students must receive a grade of 70 or above on the final exam and each home-study problem. To graduate, students must have an overall average of 70 or above on the exam and home-study problems. At the end of the final year, we will mail an official transcript to the address on your application. You may contact the school registrar to request additional copies.

Attire:

The school is conducted in an informal workshop atmosphere. Casual clothes are recommended and classrooms can be chilly.

Attendance & Graduation:

Students must be prepared to participate at all school functions, from the banquet on Sunday, July 12 through the exam and graduation on Friday, July 17. Students are expected to attend all sessions; complete the required work, including all home-study problems; and take the final examination. Graduation will be held at Renaissance Orlando Resort & Spa at Disney Springs. 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.

CANCELLATIONS

- Cancellations 2-4 weeks prior to the event will be refunded minus a 25% processing fee.
- There are no refunds or credits for cancellations within two (2) weeks of an FBA event.
- For Emergencies and last-minute cancellations please refer to the FBA School Cancellation Policy.

HOTEL/HOUSING

Hotel: Renaissance Orlando Resort & Spa at Disney Springs, Grand Ballroom I-IV
1905 Hotel Plaza Boulevard, Lake Buena Vista, Florida 32830
Room Rate: $174 per night ++
Date: July 12–17, 2026
Reservations: Call (407)828-2828 and mention the FBA's 66th Annual Trust & Wealth Management School, or register online.

Reserve Here

Reservation Deadline: Wednesday, June 10, 2026, or until the room block has sold out. Reservation requests made after June 11 will be accepted on a space- and rate-available basis. Students are required to make and pay for their own hotel reservations, which allows each institution to determine single or double occupancy.

MEALS

Lunch is provided each day, Monday through Thursday.

- Dinner is only provided at the Sunday banquet.
- Breakfast and dinner are not provided Monday through Friday.
- Refreshment breaks:
  - Two breaks will be provided Monday through Thursday.
  - One break will be provided Friday.
- The first meal will be the Sunday banquet on July 12.
- The last meal will be lunch on Thursday, July 16.

FBA EDUCATION CONTACT

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