

Florida Trust & Wealth Management School
July 12-17, 2026
Freshman Year Schedule - Grand Ballroom II
V4

TIME	July 12 SUNDAY	July 13 MONDAY	July 14 TUESDAY	July 15 WEDNESDAY	July 16 THURSDAY	July 17 FRIDAY
8:00 - 9:45 AM		Chapters 736 & 738: A Primer RANDY POPLÉ DALISHA HERRING	Basic 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 POPLÉ DALISHA HERRING	Basic Fiduciary & Estate/Gift Tax Law LESTER LAW	Investment Management PERRY LONG	Case Studies in Planning DAVID FRYE	Graduation 10:30 - 11:00 AM GRAND I
11:45-12:45 PM		LUNCH	LUNCH	LUNCH	LUNCH	
12:45 - 2:30 PM		Personal Trust Basics RANDY POPLÉ DALISHA HERRING	Basic Financial Planning CELESTE BYERS	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 GRAND FOYER	Regulations & Risk Management JASON SEILER	Basic Financial Planning CELESTE BYERS	Estate Administration & Basic 706 HUGH DOERR	Fiduciary Liability & Ethics ADAM GOLDBERG	

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

Attendance at Graduation is required
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