

45TH ANNUAL

MOKAN

**TRUST & FINANCIAL
SERVICES CONFERENCE**

**Overland Park
Convention
Center**

**Overland Park,
Kansas**

May 15 – 17



2024 MOKAN Trust & Financial Services Conference

Overland Park Convention Center Overland Park, Kansas May 15 – 17

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Conference At A Glance

Schedule

Wednesday, May 15

- 9 a.m. – 4 p.m. Conference Registration
- 10 – 11 a.m. General Session
- 10 a.m. – 3:30 p.m. Trade Show Opens
- 11 a.m. – Noon Lunch Buffet
- Noon Welcome & Call to Order
- 12:15 – 1:15 p.m. Opening Keynote Speaker
- 1:15 – 1:45 p.m. Refreshment Break
- 1:45 – 2:45 p.m. Breakout Sessions
- 2:45 – 3:15 p.m. Refreshment Break
- 3:15 – 4:15 p.m. Breakout Sessions Repeat
- 4:30 – 5:30 p.m. Business Partners Reception

Thursday, May 16

- 7:30 a.m. – 8:30 a.m. Breakfast
- 7:30 a.m. – 4:00 p.m. Registration Desk Open
- 8:00 a.m. – 2:15 p.m. Exhibit Hall Open
- 8:45 – 9:45 a.m. Welcome & First General Session
- 9:45 – 10:15 a.m. Refreshment Break
- 10:15 – 11:30 a.m. General Session
- 10:15 – 11:30 a.m. Lunch
- 11:30 a.m. – 1 p.m. Introduce Business Partners & Announce Vendor Prize Drawings
- 1 – 2:15 p.m. General Session
- 2:15 – 2:30 p.m. Refreshment Break & Trade Show Ends
- 2:30 – 3:30 p.m. Breakout Sessions
- 3:30 – 3:45 p.m. Refreshment Break
- 3:45 – 4:45 p.m. Breakout Sessions Repeat
- 4:45 – 6 p.m. Reception

Friday, May 17

- 7 – 7:45 a.m. Buffet Breakfast
- 7:30 a.m. Grand Prize Drawings
- 8 – 9 a.m. General Session
- 9 – 9:15 a.m. Refreshment Break
- 9:15 – 10:15 a.m. General Session
- 10:15 – 10:30 a.m. Refreshment Break
- 10:30 – 11:30 a.m. General Session
- 11:30 a.m. Adjourn

Continuing Education Credits

The program will be submitted to the following for continuing education credits approval:

CLE – Arkansas, Iowa, Kansas, Missouri, Nebraska, Oklahoma
CFP, CTFA, CISP, CRSP
Kansas Insurance Credits



CPE Credits

The Missouri Bankers Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website nasbaregistry.org.

Once approved, the continuing education credits will be available on the following websites:

www.mokantrustconf.com

www.mobankers.com

Information will also be available at the conference. For information regarding credits, please contact Cheri Messerli at the Missouri Bankers Association by phone (573) 636-8151 or e-mail cmesserli@mobankers.com.



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Agenda

Wednesday, May 15

9 a.m. – 4 p.m.

Conference Registration

9:45 – 11 a.m.

Welcome and Opening Remarks

General Session

Recent Developments in Federal Wealth Transfer Taxes

Sam Donaldson, Professor of Law

Georgia State University, Atlanta

Stay up to date with this informative and entertaining recap of important cases, rulings, regulations, and legislation from the past 12 months in the federal estate and gift tax laws. Specific topics to be addressed will likely include proposed anti-abuse exceptions to the anti-clawback regulations, proposed regulations on the deduction for estate administration expenses, and new deadlines for portability elections.

10 a.m. – 3:30 p.m.

Trade Show Opens

11 a.m. – Noon

Buffet Lunch in Exhibit Hall

Noon – 1:15 p.m.

Announcements and General Session

Recent Developments in Federal Income Taxes

Sam Donaldson, Professor of Law

Georgia State University, Atlanta

This session will recap important cases, rulings, regulations, and legislation from the past 12 months in the federal income tax laws. Specific topics to be addressed will likely include the IRS's ongoing woes with the Administrative Procedure Act, recent changes to the minimum distribution rules, and the new rules applicable to syndicated conservation easements.

1:15 – 1:45 p.m.

Refreshment Break in Exhibit Hall

1:45 – 2:45 p.m.

Three Concurrent Breakout Sessions

Planning for Unique Assets: What's a Trustee to do (with this stuff)?

Jeff Keiser, Director of Family Office Services

Archford Capital Strategies

When addressing unique assets in estate planning, trustees bear the crucial responsibility of not only collecting and managing trust assets but also prudently diversifying them. Fiduciaries must recognize the distinctive nature and regulatory considerations associated with certain assets. Understanding the client's intentions regarding these unique holdings is pivotal in crafting an effective estate plan that carries out the Grantor's intentions but also protects the Trustee. Questions regarding the legal acquisition of such assets, potential sale, charitable disposition, and the significance for the succeeding generation must be carefully addressed. The allocation of maintenance costs also warrants consideration. Fiduciaries, in their duty to diversify trust assets, may require specific authorization within the estate plan to retain unique assets, as a generic provision absolving the duty to diversify may prove inadequate. While indemnification clauses in the will or trust may protect the trustee concerning unique assets, their specialized nature might necessitate the hiring of experts. This presentation will delve into these issues concerning assets like digital assets, artwork, alcohol, firearms, collectables, and coins.



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Wednesday, May 15

Three Concurrent Breakout Sessions (continued)

Keeping Seniors Safe – Preventing and Reporting Financial Exploitation – *Courtyard 2*

Erin L. Anderson, Attorney

Kirkland Woods & Martinsen LLP

Reported losses from financial elder abuse have more than doubled over the last several years. Given the aging of the investing population, this trend will continue to grow. This program will outline this problem and review best practices to protect seniors from exploitation. It will also provide tools to protect financial institutions from liability when reporting potential exploitation.

Alternative Investments

Karen Weber

Weber Elder Law Office

This session will cover the four ways to finance nursing home costs, including long term care insurance, Medicare, and Medicaid coverage issues.

- 2:45 – 3:15 p.m. **Refreshment Break in Exhibit Hall**
- 3:15 – 4:15 p.m. **Breakout Sessions Repeat**
- 4:30 – 5:30 p.m. **Business Partners Reception in Exhibit Hall**

Thursday, May 16

- 7:30 a.m. – 8:30 a.m. **Breakfast in Exhibit Hall**
- 7:30 a.m. – 4:00 p.m. **Registration Desk Open**
- 8:00 a.m. – 2:15 p.m. **Exhibit Hall Open**
- 8:45 – 9:45 a.m. **Welcome & General Session**
What Does Mid-Year Look Like?
Chris Kuehl, Ph.D., Managing Director
Armada Corporate Intelligence

By now we have all had time to digest those early year forecasts. Have we continued to dodge that recession bullet or did our luck run out? Where are we with inflation, interest rates, worker shortages, supply chain woes and all those other issues that affected 2023? Has politics started to play a role and what about geopolitics?

- 9:45 – 10:15 a.m. **Refreshment Break in Exhibit Hall**



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10:15 – 11:30 a.m.

General Session

Using Trusts as IRA Beneficiaries

Jeffrey Levine, CPA/PFS, CFP®, CWS®, BFA®, MSA

Lead Financial Planning Nerd, Kitces.com

Chief Planning Officer, Buckingham Wealth Partners

The U.S. retirement market is roughly \$30 trillion, and more than half of those assets are held in IRAs and similar defined contribution plans. Much of that wealth rests in the hands of an aging Baby Boomer generation, and financial advisors will play a critical role in passing these assets along to clients' beneficiaries as intended, and as tax efficiently as possible. Sometimes, that may require using a trust as an IRA beneficiary. But while these tools can be incredibly effective at protecting and preserving wealth, they can also add considerable cost and complexity to a plan. In this session, attendees will learn about some of the biggest pros and cons of leaving an IRA to a trust, as well as the critical IRA trust rules they must know in order to properly guide clients.

10:15 – 11:30 a.m.

Refreshment Break in Exhibit Hall

11:30 a.m. – 1 p.m.

Lunch / Introduce Business Partners & Announce Vendor Prize Drawings

1 – 2:15 p.m.

General Session

Seamlessly Integrating Social Security Benefits into a Client's Retirement Plan

Jeffrey Levine, CPA/PFS, CFP®, CWS®, BFA®, MSA

Lead Financial Planning Nerd, Kitces.com

Chief Planning Officer, Buckingham Wealth Partners

Social Security benefits are a bedrock element of most retirement plans. Unfortunately, the litany of rules that govern such benefits, including those that determine eligibility, taxation, timing, and calculation, are incredibly complicated, making it difficult for clients and advisors alike to determine the best course of action.

In this session, attendees will take a deep dive into the rules that surround various types of benefits provided by the Social Security Administration, including retirement benefits, spousal benefits, and survivor benefits. Attendees will also explore how delaying Social Security benefits compares to other options, how the special formula for determining the taxable amount of Social Security can dramatically impact net benefits, how losing benefits to the Earnings Test can result in greater lifetime benefits, and much more.

2:15 – 2:30 p.m.

Refreshment Break in Exhibit Hall

2:30 – 3:30 p.m.

Three Concurrent Breakout Sessions

Fiduciaries Gone Wild! (Just Because You Can, Doesn't Mean You Should- Part III)

Terri D. Thomas, JD, Executive Vice President and Chief Operating Officer

Kansas Bankers Association

This session examines the antics of rogue fiduciaries in trust situations. While we all know the importance of a trust officer being well-versed in a variety of subjects, including tax, investments, and trust laws, sometimes what is neglected is the ethical responsibilities of the position. This session will cover not only the laws and regulations that affect the ethical duties of trust officers but will also examine where liability can arise when the trust officer forgets the fundamental rule that just because the law says you can do it, doesn't mean you should. Note for trust officers who are attorneys, this implicates "Missouri Professional Conduct Rule 4-2.1 Advisor" and "Kansas RPC 2.1 Advisor."



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Overland Park Convention Center **Overland Park, Kansas** May 15 – 17

Agenda

Thursday, May 16

Three Concurrent Breakout Sessions (continued)

Paying Caregivers from a Trust: Mitigating Risk to Safeguard Assets

Joe Sofia, Chief Revenue Officer

TEAM Risk Management Strategies

Do your clients' pay caregivers, companions, or family members either directly or out of a trust? While these arrangements are often managed casually, there is a great deal of time and care that must go into handling these employment situations properly – or risk being held liable for noncompliance. Not only are employers left with the responsibility of keeping up with ever-changing regulations around hiring, HR, terminations, and everything in between – but doing so can be a full-time job. In this session, Cheryl will arm you with best practices and practical tips to keep you, your clients, and their assets safeguarded when employing household staff.

Donor Advised Funds: How and When DAFs Can Help Your Clients Reach Their Goals

Ryan Fitzgerald, Presidents Club, Business Development Executive

Ren

Please join Ren's team of charitable giving experts for a deep dive into the definition and attributes of donor-advised funds (DAFs) and how to leverage their benefits to help your clients reach their philanthropic goals. We will take some time to review how DAFs work and the various ways donors can take advantage of the benefits offered with this unique charitable giving vehicle. We will also cover four of the most important attributes that make DAFs a valuable component of any comprehensive wealth management strategy. Finally, we will review five of the most common "what if" scenarios where a DAF could be the right solution for your client to ensure you are equipped with the information and knowledge to make the most out of your clients financial and philanthropic objectives. The session will then conclude with an opportunity for you to participate in a live Q&A with our team. We look forward to seeing you there!

3:30 – 3:45 p.m. **Refreshment Break in Exhibit Hall**

3:45 – 4:45 p.m. **Breakout Sessions Repeat**

4:45 – 6 p.m. **Evening Reception**



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Agenda

Friday, May 17

7 – 7:45 a.m. **Buffet Breakfast**

8 – 9 a.m. **General Session**

Artificial Intelligence – Is it an Oxymoron or Transformative?

Mike Tropeano, CFA, AIF, Vice President

Broadridge Consulting Services

What can be made of all the hype around artificial intelligence? Will it have an impact on wealth management and the bank trust sector. How significant will it be? What do we need to consider when deploying AI in our front, middle and back offices? How should we look at this from a compliance lens? It is clear there are more questions than answers. During this session, we define what artificial intelligence really is, quantify the user cases and give you actionable insights to talk back to your organization.

9 – 9:15 a.m. **Refreshment Break and Grand Prize Drawing**

9:15 – 10:15 a.m. **General Session**

Advisor Portfolio Construction Trends and Insights

AJ Babb, Senior Investment Consultant

Vanguard's Financial Advisor Services™

This presentation offers insights into how your peers are managing their portfolios based on data provided Portfolio Analytics and Consulting Service. This session will help you take advantage of new opportunities, sidestep potential portfolio construction issues, and implement your investment strategies with confidence.

10:15 – 10:30 a.m. **Refreshment Break**

10:30 – 11:30 a.m. **General Session**

The FUNdamentals of Meaningful Leadership

Paul Long

In this keynote experience, Paul Long leverages his concept of "Fundamism" to deliver a more deliberate approach in the creation of professional and personal fulfillment. Organizational change, culture and our professional experience are created both top down and the bottom up. Impactful leaders consistently find a way to help teams feel empowered to manifest the experience they desire. Whether you are a leader of a team, family or just looking for ways to lead yourself, Paul's FUNdamentals Of Meaningful Leadership will arm you with tactical ideas to enhance your overall effectiveness. An added benefit? Paul's unique delivery and infectious energy will lead you through a wealth of emotions as you laugh, think and have FUN. At a time where many are waiting for others to create fulfillment for them, be the leader who feels empowered to and helps others manifest it themselves!

11:30 a.m. **Adjourn**



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General Information

Registration Information

First Registration	\$515
Additional Registration	\$430
7 or more Registrations	\$410
Hardcopy of Conference Materials	\$175
Guest	\$180
Non-Sponsoring Vendor*	\$1000

(ALL REGISTRANTS WILL HAVE ACCESS TO HANDOUTS THROUGH THE DIGITAL APP)

A COPY OF THE HANDOUTS IS AN ADDITIONAL FEE OF \$175 AND WILL BE MADE AVAILABLE AT REGISTRATION.

PRINTED COPIES MUST BE PRE-ORDERED.

*Applies to vendors who are not sponsoring an event at the conference. This is not a trade show fee.

Fees include all meals, receptions, refreshment breaks, and conference materials.

The guest fee of \$180 covers all meal functions each day. Spouses and guests are also welcome to attend all general and breakout sessions.

The cost of meals and refreshments in the registration fee for this meeting is \$180. This information is provided for your institution’s tax records, in keeping with the IRS 50% deductible provisions under Section 274(n) of the Internal Revenue Code.

Cancellation Policy

A full refund will be made for cancellations received on or before Thursday, April 18. An administrative fee of \$70 per canceled registration will be retained after Friday, April 19. Cancellations will not be accepted after Monday, May 6, and no refunds will be given. Substitutions are always permitted. Advance conference financial commitments necessitate this policy.

Attendance Policy

To preserve the integrity of our registration process, no one will be admitted into the conference sessions, exhibit hall or other events without a name badge. Your name badge will serve as your official ticket to all events.

Make checks payable to “MOKAN Conference Association, Inc.” and send with completed enrollment form to:

LeAnn Mott Phone (785) 232-3444
 Kansas Bankers Association FAX (785) 272-8392
 P.O. Box 4407
 Topeka, KS 66604

Walk-in registrants must pay registration fee by credit card or check. NO INVOICING. Registrants enrolling the day of the conference will not be guaranteed a place at meal functions.

Dress Attire

Business casual is recommended for all sessions. Remember, meeting room temperatures and personal comfort zones vary widely. It is recommended that you bring a sweater or jacket to the sessions.



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General Information

Overnight Accommodations

Before April 23, 2024, make your hotel reservations directly with:

Sheraton Overland Park Hotel at the Convention Center
6100 College Boulevard
Overland Park, KS 66211

Conference Location

All sessions and meal functions will be held at the Overland Park Convention Center.

Call the Sheraton Direct Reservations number 913-234-2100 to make your room reservations. Ask for the MOKAN Trust Conference rate. Be sure to confirm dates of the conference with reservation agent.

Room Rates: (Rates increase after April 23, 2024)

\$195 Single or Double occupancy, per room, per day, plus taxes. Maximum of 4 adults per room.

The block of rooms will be held until April 23 or until the block is full for the rate of \$195, at which time all unreserved guest rooms in the MOKAN block will be released for sale to the public. Following that date, reservations will be accepted on a space-available basis at a higher rate. **EARLY RESERVATIONS ARE ENCOURAGED.**

Staff Contacts

Kansas Bankers Association

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Missouri Bankers Association

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Missouri Bankers Association
P.O. Box 57
Jefferson City, MO 65102

Email: cmesserli@mobankers.com
Phone: (573) 636-8151

Registration Desk Schedule

Wednesday, May 10..... 9 a.m. - 4 p.m.

Thursday, May 11..... 7:30 a.m. - 4 p.m.

Friday, May 12..... 7 a.m. - 11:15 a.m.



2024 MOKAN Trust & Financial Services Conference

REGISTRATION FORM

May 15 – 17 - Overland Park Convention Center

Please TYPE or PRINT appropriate section(s) below. Deadline for printed badges is Monday, May 6th.

You may photocopy this form for additional registrants.

First Registrant

Name _____
 Title _____
 Bank/ Firm _____
 Address _____
 City/State/Zip _____
 Phone _____
 Email _____
 Guest Name _____

Additional Registrant

Name _____
 Title _____
 Bank/ Firm _____
 Address _____
 City/State/Zip _____
 Phone _____
 Email _____
 Guest Name _____

Additional Registrant

Name _____
 Title _____
 Bank/ Firm _____
 Address _____
 City/State/Zip _____
 Phone _____
 Email _____
 Guest Name _____

* A guest is a spouse, significant other, or friend who is not in a financial services occupation and will be attending events, meals, and receptions with you. Official name badges required for all events.

Registration Fees

(ALL REGISTRANTS WILL HAVE ACCESS TO DIGITAL APP)

First Registration\$515 # _____ \$ _____
 Additional Registration\$430 # _____ \$ _____
 7 or more Registrations\$410 # _____ \$ _____
 Hardcopy of Conference Materials\$175 # _____ \$ _____
 Guest\$180 # _____ \$ _____
 Non-Sponsoring Vendor*\$1000 # _____ \$ _____
 Total amount due\$ _____

*Applies to vendors who are not sponsoring an event at the conference. This is not a trade show fee.

Payment

with Check

Check enclosed, payable to MOKAN Conference Association, Inc.

Amount Due \$ _____
 ----- or -----

with Credit Card Please type or print

VISA
 MasterCard
 AMEX
 Discover
 Amount Due \$ _____

Exp. Date _____ No. _____

Print Name _____

Signature _____

(I agree to pay the above total amount)

Cancellation Deadlines

A full refund will be made for cancellations received on or before Wednesday, April 24th. An administrative fee of \$70 per canceled registration will be retained after Wednesday, May 1st. Cancellations will not be accepted after Monday, May 6th, and no refunds will be given.

Substitutions are always permitted with advance notice.

Advance conference financial commitments necessitate this policy.

Please return this form with payment to:

ATTN: LeAnn Mott
 Kansas Bankers Association
 P.O. Box 4407
 Topeka, KS 66604

lmott@ksbankers.com
 Phone: 785-232-3444
 FAX: 785-272-8392