



2024 EDUCATIONAL/DEVELOPMENT FORUM

Renaissance Waverly Atlanta Hotel and Convention Center
2450 Galleria Parkway
Atlanta, GA 30339

MONDAY, APRIL 22 – WEDNESDAY, APRIL 24, 2024

AGENDA

MONDAY, APRIL 22

- | | |
|-----------------|---|
| 12:00 – 6:00 PM | Exhibitor set-up (Kennesaw Conference Room) |
| 3:00 – 6:00 PM | Registration for Members, Friends, and Guests |
| 6:00 – 6:40 PM | NTREA Cocktail Reception (Hotel Atrium) |
| 6:40 – 7:00 PM | Opening Remarks / Introductions |
| 7:00 – 8:30 PM | Dinner |

Cocktail Reception / Dinner sponsored by COLVENT GROUP. Thank you to Chuck Collier and Anna Harris!



TUESDAY, APRIL 23

- | | |
|----------------|--------------------------|
| 7:45 – 8:30 AM | Breakfast (Hotel Atrium) |
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Sponsored by PEOPLES COMPANY. Thank you to Dave Englund, Lima Thiago, and Kayla Rowan!



- 8:30 – 9:00 AM Opening Remarks / Introductions (Kennesaw Conference Room)
- Chris Procise - CIBC
 - Carol Smart - Regions Bank
 - Caroline Thompson – Wells Fargo Bank
- NTREA Introduction of Attendees and FRIENDS
- April Drennan – Membership Chair
 - Jeremy Taylor – Friends Chair
- 9:00 – 9:50 AM When Trusts Fail: Consequences of Mishandling Real Estate
Patrick Alyward – Trustworthy Consultants
- 9:50 – 10:40 AM Real Estate Counseling for Trusts & Estates
Ladson Haddow and Chris Hill - Haddow & Company
- 10:40 – 11:00 AM Break – Visit FRIENDS Display Area

Sponsored by FARMERS NATIONAL COMPANY and BRUCE PROPERTY TAX SOLUTIONS, LLC.
Thank you to Melody Martinez, Thomas Kelley, Mark Bruce, and Kandis Easterwood!



- 11:00 – 11:55 AM Environmental Law & Fiduciary Liability
Scott Hitch, Esq. – Hitch Law LLC
- 12:00 – 1:00 PM Lunch (Hotel Atrium)

Sponsored by RYAN, LLC.
Thank you to Karen Breaux, Viviane Ellamaa, Keith Schuster, and Andy Taylor!



- 1:00 – 1:55 PM Estate Settlement & The Residence
Chuck Carter – Retired Trust Advisor

1:55 – 2:50 PM Don't Skip the Annual Inspection!
Robert George – Trust Asset Service Company (TASC)

2:50 – 3:10 PM Break - Visit FRIENDS Display Area

Sponsored by SS&C INNOVEST. Thank you to Donna Austin and Francis Bravo!



3:10 – 4:05 PM Working on Co-Trustees – Best Practices – Virtual Panel Session
Richard Trumpler – Trumpler Wealth Consulting

4:05 – 5:00 PM Career Development & The Value of Mentoring
Carolyn Donnelly & Frances Boatwright – CIBC Private Wealth

6:00 – 10:00 PM Miami Marlins @ Atlanta Braves Game – Truist Park – Hank Aaron Terrace
Game starts at 7:20 PM

Baseball Game Sponsored by TASC. Thank you to Robert George and Bryan Halulko!



WEDNESDAY, APRIL 24

7:45 – 8:30 AM Breakfast (Hotel Atrium)

8:30 – 9:25 AM Farmland Economics & Valuation
Dave Muth, PHD – Peoples Company

9:25 – 10:20 AM Environmental Risk Management: A deep dive into full cycle environmental due diligence from policy development through assessment and solutions
Kathryn Peacock – Partner Engineering

10:20 – 10:40 AM Break – Visit FRIENDS Display Area

10:40 – 12:00 PM Friend / Sponsor Updates

12:00 – 1:00 PM Lunch (Hotel Atrium)

1:00 – 2:15 PM Discussion Panel – Best Practices

2:15 – 2:35 PM	Break
2:35 – 3:30 PM	Listing, Sale Addendums, & Seller Disclosures Grant Wilmer, Esq. – Arnall Golden Gregory LLP
3:30 – 4:30 PM	NTREA Annual Meeting / Election of Officers / Recognition Awards Board Members – Kennesaw

Open Evening for Networking!

A special THANK YOU to CIBC and Regions Bank for hosting the 2024 NTREA Forum!



PRIVATE WEALTH MANAGEMENT