






# MAINE BANKERS

Association

## TRUST AND WEALTH MANAGEMENT CONFERENCE

May 4, 2016 | Harraseeket Inn, Freeport



- 
- 8:30 a.m. Registration & Continental Breakfast with the Vendors--Casco Bay Room
- 9:00 a.m. **WELCOME/VENDOR INTRODUCTIONS**  
Tom Whelan—Bath Savings Institution  
Chair, MBA Trust & Wealth Management Committee
- 9:15 a.m. **SOCIAL SECURITY UPDATE—CHANGES IN THE BIPARTISAN BUDGET ACT**  
Karen L. Ireland, CFP, CPRC, Business Development Consultant--MFS Investment Management
- 9:45 a.m. **SAY GOODBYE TO TITLE 18-A—UPDATING THE MAINE PROBATE CODE  
AFTER 35 YEARS OF FAITHFUL SERVICE**  
David J. Backer, Esq.—Drummond Woodsum
- 10:15 a.m. Coffee Break—Visit with Vendors
- 10:45 a.m. **LEGAL ISSUES**
  - Advantages of Terminating Credit Shelter Trusts
  - Trust ProtectorsRichard J. Abbondanza, Esq.—Hopkinson & Abbondanza
- 11:15 a.m. **ECONOMIC OUTLOOK**  
John Sherman, Vice President and Senior Portfolio Manager—Federated Investors
- 12:15 p.m. Luncheon—Compliments of 
- 1:15 p.m. **ELDER ISSUES: RESETTLING/DOWNSIZING/LIQUIDATING**
  - Liz Pattison and Kim Dorsky—Simply Sized Home
  - LaGina Austin—Skinner, Inc.
  - John Bottero—Thomaston Place Auction Galleries
- 2:00 p.m. Refreshment Break—Compliments of  **Broadridge**
- 2:15 p.m. **HOW TO STAY MOTIVATED ON THE DECK OF THE TITANIC**  
Norm Bossio—Norm Bossio Enterprises
- 3:15 p.m. ADJOURNMENT

*Conference is approved for 4.5 CTFA, 2.5 CFP and 1.5 CLE credits.*