

**Private Trust
Company
Workshop**

Virtual event
Jan. 28-30, 2025

The private trust company has endured the test of time as a robust structure for achieving the multi-generational goals of wealth preservation, stewardship, and upholding flourishing families.

This program is essential for families currently forming or considering a PTC and insightful to family members and qualified trustees hoping to better understand their PTC structure. This workshop brings together leading experts and PTC executives to share their experience and insight about the PTC's special role in the family enterprise.

Day 1: Fundamentals—concentrates on fundamental questions for families and their advisory team exploring or currently forming a PTC.

Day 2: All Audiences—involves more qualitative questions and best practices and is appropriate for anyone with an interest in PTCs at any level of experience.

Day 3: Advanced—reviews more advanced topics for those who have experience and are looking to take an established PTC to the next level.



Family
Office
Exchange

Private Trust Company Workshop

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THE FULL AGENDA WILL BE AVAILABLE IN DECEMBER 2024

Who Should Attend

- Days 1 and 2 are appropriate for families and their advisory team exploring or currently forming a PTC.
- Days 2 and 3 are appropriate for those with established PTCs who are interested in taking their trust company to the next level.
- Those interested in a refresher and in exploring more complex topics will want to attend all 3 days.

To Register and Learn More

To see the full agenda and register, visit us online at familyoffice.com/PTC25 or contact your relationship manager. For questions, please contact us at events@familyoffice.com.

ATTENDEES WILL LEARN THE FOLLOWING

- Why families form a PTC
- The role of the PTC in supporting the family enterprise
- What differentiates the PTC structure from other trust and regulated structures
- Considerations regarding charter states and whether or not to be registered
- Options and best practices on structure, ownership, governance and operations
- Opportunities to create healthy trustee and beneficiary relationships
- How to identify and mitigate tax and regulatory risks in operation of the PTC
- Cutting edge techniques and future trends for the PTC
- Lessons learned from seasoned PTC executives and experts

TO DATE, THE PRESENTERS INCLUDE:

- John Bunge, Partner, Holland & Knight LLP
- Jason Kohout, Partner, Foley & Larder LLP
- Matthew J. Scheer, Shareholder, Gunster
- Judy Pearson, President, Nomadx
- Matt Tobin, COO, Managing Director, Legal Counsel, South Dakota Trust Company LLC
- Scott D. Weaver, General Counsel & Chief Fiduciary Officer, Willow Street



Up to 11 CPE credits can be earned by attending this event. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures and acceptance may vary by state.

	FOX MEMBERS			NON-MEMBERS		
	DAYS 1 & 2 JAN. 28-29	DAYS 2 & 3 JAN. 29-30	ALL 3 DAYS JAN. 28-30	DAYS 1 & 2 JAN. 28-29	DAYS 2 & 3 JAN. 29-30	ALL 3 DAYS JAN. 28-30
	FUNDAMENTALS	EXPERIENCED	COMPREHENSIVE	FUNDAMENTALS	EXPERIENCED	COMPREHENSIVE
INDIVIDUAL ATTENDEE	\$2,100	\$2,100	\$2,850	\$2,625	\$2,625	\$3,550
MULTIPLE ATTENDEES*	\$1,900	\$1,900	\$2,550	\$2,375	\$2,375	\$3,200
EARLY BIRD RATE	Save \$300 if registered by Dec. 20, 2024			Save \$300 if registered by Dec. 20, 2024		

*From the same family/firm

