



Webinar Seminar presented by Indiana Bankers Association Partnering with Total Training

Living Trust Documents

Thursday, September 17, 2015 11:00 a.m.– 1:00 p.m. Eastern Time

Program Content

Everyday financial institutions are required to complete transactions for customers who have created revocable and irrevocable trust. To protect the financial institution's interests when using these documents, it is imperative to understand the basic do's and don'ts. This two hour presentation is designed to provide financial institution personnel with the best practices that can be used in dealing with these complex legal documents.

Covered Topics:

- What are the differences between revocable and irrevocable trusts?
- What does it mean when a trust is called a "living trust" versus a "testamentary trust?"
- How does the financial institution establish the relationship, including changing titles and performing transactions (loans or deposits)?
- How many co-trustees does it take to bind the trust?
- When can a successor trustee do business for the trust?
- Can a power of attorney be used with a trust document?
- Can a trust own a safe deposit box?
- Can a trust co-own an account with another trust (or person)?

Who Should Attend

Financial institution employees involved with opening new accounts, deposit or loan documentation and operations will find this seminar very useful in handling daily day-to-day transactions.

About the Presenter - Terri D. Thomas

Terri D. Thomas is senior VP and legal department director for the Kansas Bankers Association. Prior to this, she was with "Bankers Choice," a financial consulting firm. Before this, Terri was employed in the financial industry for over twenty-three years in various capacities. Most notably, she served for fourteen years as in-house legal counsel and trust officer for Bank of America and its Kansas predecessors. Receiving her bachelor of from Kansas State University in 1985, Terri continued her education at Washburn

University School of Law and obtained her Juris Doctor in 1988.

Presently, she serves as an adjunct instructor at Washburn University School of Law and the University of Kansas School of Law and is a frequent seminar presenter for financial associations.

1. Live Webinar

The 2 hour **LIVE WEBINAR** option allows you to have **one telephone connection for the audio portion and one Internet connection (from a single computer terminal)** to view online visuals as the presentation is delivered. You may have as many people as you like listen from your office speaker phone. Registrants receive a toll-free number & pass code that will allow entrance to the seminar. Seminar materials, including instructions, pin number, & handouts will be emailed to you prior to the broadcast. You will need the most current version of Adobe Reader available free at www.adobe.com.

2. On-Demand Web Link

Can't attend the live webinar? The ON-DEMAND WEB LINK is a recording of the live event including PowerPoint and class materials. This web link can be viewed anytime 24/7, beginning 6 business days **AFTER** the webinar and will expire 6 months after the live program date. Use the on-demand link or this "off-the-shelf" training program for those that could not attend the live seminar & for future training.

3. CD-Rom

For an additional \$60 the audio CD and printed class materials can be mailed to you.

4. Live plus On-Demand Web Link

Includes options 1 & 2.

5. Premiere Package

Includes options 1, 2 & 3

Cancellation Policy

Within three or more business days prior to the day of an educational program, no cancellation charge will be assessed. If your bank is unable to participate after registering, you can select to purchase the on-demand recorded presentation.

Registration Form - September 17, 2015

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<u>Live Webinar</u>	<u>On-Demand Web Link</u>	<u>On-Demand w/ CD</u>	<u>Live plus OnDemand</u>	<u>Premiere Package</u>
Member <input type="checkbox"/> \$265 Single Location <input type="checkbox"/> \$75 Each Additional Location	Member <input type="checkbox"/> \$295	Member <input type="checkbox"/> \$ 325	Member <input type="checkbox"/> \$ 365	Member <input type="checkbox"/> \$ 395
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