

## Registration Form for 2014 Trust Conference

Please register the following person(s) for the 2014 Trust Conference to be held on Thursday April 24, 2014, at the Columbia Conference Center, 169 Laurelhurst Avenue, Columbia, S.C. Registration fees are \$125 per member and \$350 per non-member. The total number of registrants is \_\_\_\_.

Name and Nickname \_\_\_\_\_

Address, City, State, Zip \_\_\_\_\_

Phone & E-mail address \_\_\_\_\_

Bank or Firm \_\_\_\_\_

Name and Nickname \_\_\_\_\_

Address, City, State, Zip \_\_\_\_\_

Phone & E-mail address \_\_\_\_\_

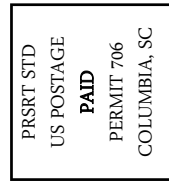
Bank or Firm \_\_\_\_\_

Name and Nickname \_\_\_\_\_

Address, City, State, Zip \_\_\_\_\_

Phone & E-mail address \_\_\_\_\_

Bank or Firm \_\_\_\_\_



### Method of Payment: \$125 per member and \$350 per non-member

- Check-Please make payable to South Carolina Bankers Association  
 VISA     MASTERCARD     DISCOVER     AMERICAN EXPRESS

Credit Card # \_\_\_\_\_ Exp. date \_\_\_\_\_ V-code (last 3 digits) \_\_\_\_\_

Signature \_\_\_\_\_ Billing Zip Code \_\_\_\_\_

### How to Register



**By mail:** Mail to: SCBA,  
P.O. Box 1483, Columbia,  
S.C., 29202-1483



**By fax:** Complete form  
and fax to: SCBA,  
803.779.0890



**By Internet:** At  
[www.scbankers.org](http://www.scbankers.org), go to  
"Education and Events"

*\*\*If you have a disability that may affect your participation in this event, please attach a statement regarding those needs. We will be happy to contact you to discuss accommodations.*



South Carolina Bankers Association  
PO Box 1483, Columbia, SC 29202-1483  
Phone: 803-779-0850  
Fax: 803-779-0890  
Website: [www.scbankers.org](http://www.scbankers.org)



PO Box 1483  
Columbia, SC 29202-1483

**Inside: 2014 Trust Conference**



South Carolina  
Bankers Association

## 2014 Trust Conference



Thursday, April 24, 2014

Columbia Conference Center  
169 Laurelhurst Avenue  
Columbia, South Carolina

9:00 a.m. - 3:30 p.m.

**Registration Deadline: April 18, 2014**

This Conference has been submitted for approval for Continuing Legal Education Credits and for Certified Trust and Financial Advisor Credits

## About the Conference

The SCBA Trust Committee is proud to announce its annual **Trust Continuing Education Conference**. Our program is designed to benefit trust department personnel at all levels. The morning will begin with a **Probate Code Update** presented by The Honorable Amy M. McCulloch, Richland County Probate Judge, S.C. Judicial Department, Columbia.

David C. Sojourner, Jr., Esq., Member of Sojourner Caughman & Thomas, LLC, Columbia, will present **South Carolina Trust Code Update**. Dave's session will provide an overview of recent changes to the South Carolina Trust Code, including options for converting existing trusts to total return unitrusts and the use of trust protectors and trust investment advisors.

**Modifying Irrevocable Trusts: Trust Decanting and Court-Ordered Trust Modifications** will be presented by Briani Bennett Mellen and William G. Newsome III, both of Nexsen Pruet, LLC, Columbia. They will discuss opportunities available under the South Carolina Trust Code to amend or modify irrevocable trusts. The newly updated Trust Code now allows for trust decanting, which provides the trustee with the power to distribute property to another trust for the benefit of the trust's beneficiaries. The second trust may be drafted to amend administrative provisions or address changed circumstances facing the trust or its beneficiaries. The panelists will also discuss the possibility of seeking court-ordered modifications of a trust under circumstances where decanting may not be available. Briani is a co-author of the BNA Tax Management Portfolio on Trust Decanting, No. 871, and has written for numerous trade publications on matters involving estate planning and trust administration, including the *Real Property Trust and Estate Law Journal*, *Trusts & Estates*, and *Estate Planning* magazine. William is a Certified Specialist in the areas of Estate Planning and Probate Law by the S.C. Supreme Court and contributing author to *Estate Planning in South Carolina*.

**Michael W. Orange**, Supervisory Examiner, CFRIS, Division of Risk Management Supervision, FDIC, Atlanta, GA, will present **Establishing an Investment Program for Trust**. Michael's session will give an overview of how to develop a good investment program for a trust department. The overview will cover prudence, the governing document, the investment policy statement, and third-party service providers. The program will discuss management oversight of the investment program.

The conference will conclude with **Where Are We Now?** presented by Brian A. Barker, CFP, SCBT Wealth Management Group. On March 9, 2009, the S&P 500 closed at 676.53, the low point of a 16-month selloff that eroded more than half the S&P 500's value. Since then the financial markets have rebounded strongly despite a tepid economic recovery. We will review where we have been the past five years and what may be in store for the economy and the markets going forward. We hope you will take advantage of this trust learning opportunity.

## 2014 Trust Conference

### Special Thanks to Our Sponsors

Rachel Lyon	<b>Broadridge Financial Solutions</b>	New York, NY
Kip Anderson	<b>Federated Securities Corp.</b>	Pittsburgh, PA
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Dale Lyles	<b>Ikor of the Western Carolina</b>	Inman, SC
Michael Dinges	<b>INFOVISA, Inc.</b>	Cornelius, NC
Michael Dixon	<b>Main Street Advisors</b>	Chicago, IL
Marc Durica	<b>Portfolio Capital Management</b>	Charlotte, NC
Doug Risk	<b>SunGard</b>	Charlotte, NC

**Don't forget to visit the exhibitors to have your card validated to become eligible for the door prize!**



#### Please Share this Information with Your Associates

You are sure to be pleased with the variety of topics presented as well as the level of high-caliber speakers. Please make plans to attend and bring as many of your associates as possible. This is the most cost-effective and informative trust conference available in South Carolina.

**Please Register Before April 18, 2014**

Luncheon is included in the registration fee.

Due to necessary commitments and expenses, there will be no refund of registration fee after 12 p.m. on April 22, 2014.

**SUBSTITUTIONS CAN BE MADE**

**This Conference has been submitted for approval for Continuing Legal Education Credits and for Certified Trust and Financial Advisor Credits.**

## Conference Agenda

9:00 a.m.	<b>REGISTRATION</b> <b>COFFEE AND PASTRIES</b> <i>Much appreciation to our sponsor</i>	
9:30 a.m.	<b>BUSINESS SESSION</b> <b>Opening Remarks</b> Audrey T. Varn, Chairman, SCBA Trust Committee and President, Security Federal Trust, Columbia, SC	
9:35 a.m.	<b>SCBA Welcome and Remarks</b> Fred L. Green, III, President & CEO South Carolina Bankers Association, Columbia, SC	
9:45 a.m.	<b>Probate Code Update</b> The Honorable Amy M. McCulloch Richland County Probate Judge, South Carolina Judicial Department, Columbia, SC	
10:45 a.m.	<b>BREAK</b> <b>Please visit the exhibitors and sponsors</b>	
11:05 a.m.	<b>SC Trust Code Update</b> David C. Sojourner, Jr., Esquire Member, Sojourner Caughman & Thomas, Columbia, SC	
12:05 p.m.	<b>LUNCHEON</b> <i>Hosted by: Kip Anderson, Federated Securities Corp. Pittsburgh, PA</i>	
1:00 p.m.	<b>Modifying Irrevocable Trusts: Trust Decanting and Court-Ordered Trust Modifications</b> Briani Bennett Mellen, Associate, Nexsen Pruet, LLC, Columbia, SC William G. Newsome III, Member, Nexsen Pruet, LLC, Columbia, SC	
2:00 p.m.	<b>Establishing an Investment Program for Trust</b> Michael W. Orange, Supervisory Examiner, CFRIS, FDIC, Atlanta Field Office, Atlanta, GA	
2:35 p.m.	<b>Economic Update</b> Brian A. Barker, CFP, Senior Vice President, Senior Portfolio Manager, SCBT Wealth Management, Spartanburg and Greenville, SC	
3:25 p.m.	Door Prize Drawings	
3:30 p.m.	<b>ADJOURNMENT</b>	