MAINE BANKERS ASSOCIATION | NH BANKERS ASSOCIATION | VT BANKERS ASSOCIATION | NH TRUST COUNCIL

2026 TRI-STATE TRUST FORUM

OCTOBER 1 & 2, 2026 | VENUE AT PORTWALK PLACE, PORTSMOUTH, NH

	AGENDA
WEDNESDAY	**SEPTEMBER 30**
Tee Times TBD	**EARLY ARRIVAL GOLF** Enjoy a day of golf at a local course. It's all for fun! Pre-registration required and further details will be provided as we get closer.
THURSDAY	**OCTOBER 1**
8:00 AM – 9:00 AM	**EXHIBITOR & SPONSOR SET UP**
9:00 AM – 9:30 AM	**REGISTRATION & COFFEE WITH EXHIBITORS AND SPONSORS** **Sponsors:** **AssetMark – Thurs Afternoon Break** **Cheetah – Exhibitor Receptions** **Eternity - General** **Federated Hermes – Thursday Lunch** **Fifth Third – Exhibitor Reception** **Jordan Park Trust Company –Thursday Morning Break** **MainStreet Advisors – Thurs Afternoon Break** **NH Trust Council –Friday Morning Break** **Raymond James – Thursday Afternoon Break** **Exhibitors:** **Broadridge** **Estateably** **GreenHill** **ProxyTrust** **Infovisa, Inc.** **SS&C Black Diamond Wealth Solutions** **Systems Engineering** **Thomson Reuters** **Trust Investment Solutions**
9:30 AM – 9:35 AM	**WELCOME** **Susan Martore-Baker,** *President,* Cambridge Trust Company of NH *Chair,* NH Bankers Association Trust Committee **Jeff Nowell,** *SVP of Client Relationship Management,* Mascoma Wealth Management *Chair,* Vermont Bankers Association Trust Committee
9:35 AM – 10:15 AM	**TRI-STATE ECONOMIC UPDATE** **Andrew Paolillo,** *Vice President of Member Lending & Strategies* Federal Home Loan Bank of Boston A view of the local tri-state economy.

10:15 AM – 11:00 AM	**THE UNIFORM VOIDABLE TRANSACTIONS ACT IN NEW HAMPSHIRE: IMPLICATIONS FOR TRUSTS, CREDITORS, AND ESTATE PLANNING** Moderator: **Heather Perkins Ogmundson,** *VP, Associate Counsel & Chief Compliance Officer*, Jordan Park Trust Panelists: **Joyce Hillis,** *Attorney, Devine Millimet* **Brendan Mitchell,** *VP-Chief Fiduciary Officer,* Market Street Trust Company **Jan Myskowski,** *Attorney, Pierce Atwood* **Charles W. Mooney, Jr.,** *NH Commissioner on Uniform State Laws* This presentation will provide a broad overview of the Uniform Voidable Transactions Act and its recent adoption in New Hampshire, with particular emphasis on how New Hampshire modified the uniform act to protect qualified New Hampshire trusts and the state's trust industry. The program will explain the benefits of modernizing the older fraudulent-transfer statute, identify the estate-planning issues raised by the UVTA and its official commentary, and discuss practical implications for trustees, estate planners, fiduciaries. It will also compare New Hampshire's approach with Maine and Vermont, highlighting how regional differences may influence trust situs, asset-protection planning, entity planning, creditor litigation, and future legislative developments in northern New England.
11:00 AM – 11:15 AM	**MORNING BEVERAGE BREAK WITH EXHIBITORS** **Sponsored by Jordan Park Trust Company**
11:15 AM – 12:15 PM	**ECONOMIC UPDATE** **Alex Urbani,** ***CFA, Managing Director*** MainStreet Advisors This session evaluates the current economic and policy landscape and market environment, highlighting key trends, risks, and developments shaping investment decision-making and portfolio construction.
12:15 PM – 1:00 PM	**LUNCH** **Sponsored by FEDERATED HERMES**
1:00 PM – 2:00 PM	**THE HIDDEN POWER OF SEGMENTATION: BOOST EFFICIENCY, DRIVE PROFITABILITY** **John Henry,** ***Business Development Officer*** AssetMark Client segmentation works differently in each industry and practice, and yet there are common methods of segmenting to be found almost everywhere. For financial advisors, the most common segmentation is by clients' contribution to assets under management (AUM), but segments by age, profession, and other characteristics can also be valuable. By positioning your clients according to criteria such as assets, revenue, age, and profession, you can achieve a high level of personalization with your services. This session will explore solutions and improvement ideas.

2:00 PM – 3:00 PM	**FRAUD/CYBERSECURITY PANEL DISCUSSION** **Moderator:** **Jamie Schupp,** *Director of Risk & Compliance Management* Pohl Consulting and Training, Inc. **Panelists:** **Cameron G. Shilling**, *Director, Litigation Department, Chair-Cybersecurity and Privacy Group*, McLane Middleton Law Firm (Invited) **Erik Thomas,** *Director of Advisory Services*, Systems Engineering A panel of cybersecurity experts for trusts and wealth managers will challenge and guide the audience through an interactive table-top exercise involving a real-world funds transfer fraud incident involving banks, wealth managers, and clients. As a participant, you will experience the realistic impacts of a sophisticated and devastating cybersecurity fraud scenario, and will come away with advanced, practical measures to implement at your business to avoid you and your clients becoming the next victims of fraud.
3:00 PM – 3:15 PM	**AFTERNOON BREAK WITH EXHIBITORS** **Sponsored by MAINSTREET ADVISORS and ASSETMARK and RAYMOND JAMES**
3:15 PM - 4:15 PM	**TRUST INSTRUMENTS IN ACTION: DRAFTING, INTERPRETATION, AND FIDUCIARY DECISION-MAKING** Moderator: **Heather Perkins Ogmundson,** *VP, Associate Counsel & Chief Compliance Officer*, Jordan Park Trust Panelists: **Mark Bartram,** *Trust & Estate Planning Attorney-Shareholder*, Sheehan, Phinney **Sean Houghton,** *New Hampshire Shores Trust* **Brendan Mitchell,** *VP-Chief Fiduciary Officer,* Market Street Trust Company **Deanna Meehan**, *Founder & President,* Blackbird Trust Services, LLC **Alexander Latendresse, Esq**., *Trust Officer,* Portland Trust Company This roundtable, audience participation-style discussion, will examine recurring trust administration challenges that arise from the interpretation and drafting of trust instruments. Participants will discuss how trustees and counsel should evaluate governing law, principal place of administration, dispositive provisions, distribution standards, tax clauses, fiduciary powers, trust protector provisions, modification and decanting authority, and ambiguous language before taking action. The discussion wil also address when informal interpretation is sufficient and when court instruction, beneficiary consent, a nonjudicial settlement agreement, reformation, modification, or decanting may be appropriate. Drawing on practical experiences, common drafting issues and the lessons of relevant case law, the program will explore the duty of impartiality, the duty to inquire, the treatment of beneficiary interests, and the documentation trustees should maintain when making significant administrative or distribution decisions. Participants will also be invited to share their own experiences and perspectives on what counsel should build

	into trusts before administration begins, including administrative roadmaps, fiduciary division provisions, tax-status guidance, reporting rules, trust protector authority, dispute-resolution procedures, modification tools, consent and release mechanisms, and succession provisions that can reduce uncertainty, minimize disputes, and support more effective trust administration.
4:15 PM – 5:15 PM	**EXHIBITOR RECEPTION** **Sponsored by CHEETAH and FIFTH THIRD** Join us for a reception and peer discussions. Also take a little time to thank our sponsors/exhibitors for their support for our event.
FRIDAY	**OCTOBER 2**
8:15 AM – 9:00 AM	**FULL BREAKFAST WITH EXHIBITORS AND SPONSORS** **Sponsors:** **AssetMark – Thurs Afternoon Break** **Cheetah – Exhibitor Receptions** **Eternity - General** **Federated Hermes – Thursday Lunch** **Fifth Third – Exhibitor Reception** **Jordan Park Trust Company –Thursday Morning Break** **MainStreet Advisors – Thurs Afternoon Break** **NH Trust Council –Friday Morning Break** **Raymond James – Thursday Afternoon Break** **Exhibitors:** **Broadridge** **Estateably** **GreenHill** **Infovisa, Inc.** **ProxyTrust** **SS&C Black Diamond Wealth Solutions** **Systems Engineering** **Thomson Reuters** **Trust Investment Solutions**
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9:05 AM - 10:05 AM	**HOW TO HELP YOUR CLIENTS AVOID ELDER ABUSE** **Moderator:** **Christa Clapp,** *MPA, Elder Abuse Program Specialist, Elder Abuse and Exploitation Unit, Consumer Protection and Antitrust Bureau,* New Hampshire Office of Attorney General **Panelists:** **Aaron Ferenc,** *Deputy Commissioner of Banking,* Vermont Department of Financial Regulation **Acacia Colby,** *paralegal,* NH Banking Department **Officer Candice Simeoni**, *Kennebunk, ME Police Officer & President, York County Elder Abuse Task Force* Elder financial abuse can impact financial security, fracture families and lead to a potential loss of trust. Learn how you can protect your clients from becoming victims of elder financial abuse.
10:05 AM – 10:15 AM	**MORNING BEVERAGE BREAK WITH THE EXHIBITORS** **Sponsored by NH Trust Council**

10:15 AM – 11:15 AM	**BUILDING A COMPETITIVE, SCALABLE WEALTH MANAGEMENT PROGRAM** **Anne Schutt**, *VP of Business Development* **Midwestern Securities Trading Company, LLC** Bank wealth management programs are no longer just a source of non-interest income, but a key deposit defense strategy. Many investment firms are starting to strategically target loans and deposits, and your wealth management program is a major line of defense to better serve your clients and prevent deposit outflow. This session will walk through some of the industry trends impacting banks in the wealth management space, as well as discuss tangible ways to evolve your program to ensure it is competitive with what outside investment firms are offering your customers. It will also discuss ways to make your program scalable so you can continue to grow, while still providing top-notch service to your clients. Goals: > Gain a deeper understanding of the true competitive landscape for banks > Discuss assessing broker-dealer/OCIO relationships > Learn best practices to become more competitive > Understand key ways to build a more scalable program
11:15 AM – 12:15 PM	**COPILOT & AI FOR BANKING AND TRUST PROFESSIONALS** **Mike Lannen,** *Founder* Eternity Most of your team has heard about Microsoft Copilot. Far fewer have watched it draft a client review letter, summarize a dense trust document or compliance memo, or clean up an account spreadsheet in the time it takes to refill the coffee. This session shows trust officers, wealth managers, and bankers exactly where AI saves real time in everyday work and, just as important, where it should never be trusted without a human check. You will leave knowing what to try Monday morning and how to keep it safe. Takeaways: ➢ Put Copilot to work in real banking and trust tasks ➢ Build your own custom AI Agent ➢ A simple rule to catch AI mistakes
12:15 PM	**ADJOURNMENT**