Learn the Foundational Elements of Trust Management and Administration!

Foundations of Delaware Trusts

9 Sessions on 1 Flashdrive!
Approved for a total of 22.5 CTFA Credits!

Note: While Originally Produced in Delaware, the Content is Foundational and Applicable to Most Trust Management/Admin. Situations

Pick and Choose from the sessions below...
... or Order All 9 and Save!
See the Attached Form to Order!

Reading and Interpreting a Trust Document - 1 hr. 33 mins.
A focus on key trust document provisions such as Crummey powers, dispositive provisions, investment limitations, duty to notify provisions, etc.
Instructors: Daniel Hayward, Esq., Director, Gordon, Fournaris & Mammarella, PA; David Diamond, Esq., President, The Northern Trust Company of Delaware

Basic Income, Estate, Gift and GST Tax - 1 hr. 11 mins.
An introduction to the basic concepts and things to look for with specific types of trust, including grantor trust status, dynamic trusts, and funding concerns.
Instructors: Matthew P. D’Emilio, Esq., Director, Coach & Taylor, PA; Jenna L. Boccutti, Vice President, JPMorgan Trust Company of Delaware

Discretionary Decision-Making - 1 hr. 37 mins.
A discussion on fiduciary duties and how to interpret the various types of discretionary trust provisions.
Instructors: Cynthia D.M. Brown, CFA, President, Commonwealth Trust Company; Todd A. Flubacher, Esq., Partner, Morris, Nichols, Arsiht & Tunnell LLP

Division of Labor in Trust Administration - 1 hr. 15 mins.
A practical session on who does what and why in the administration of a Delaware trust.
Instructors: Anne Schumeyer, CFA; Lynn Welch Watson, CFP, EA, Vice President, Sr. Trust Officer, Brown Brothers Harriman Trust Co. of DE

Bank Secrecy Act and PATRIOT Act Best Practices - 1 hr. 22 min.
What do you have to know about your client and their assets before entering into a relationship?
Instructors: Mark V. Purpura, Esq., Director, Richards Leyton & Finger, PA; Matthew Rosin, Esq., Vice President - Legal Affairs, Commonwealth Trust Company; Jamie McGinley, Vice President - Trust Administration, Commonwealth Trust Company

Due Diligence in the On-Boarding of New Accounts - 1 hr. 25 min.
A discussion on the onboarding process and what diligence is required.
Instructors: Anne Schumeyer, CFA; Maria Ivensen, SW, The Northern Trust Company of Delaware

How to Properly Administer Directed Trusts - 1 hr. 29 min.
An overview of the dos and don’ts of administering directed trusts, including a discussion about sufficient due diligence, direction letters, and the trust administration process.
Instructors: Cynthia D.M. Brown, President, Commonwealth Trust Company; Scott E. Swenson, Partner, Connolly Gallagher LLP

Income and Gift Tax Planning - 1 hr. 23 min.
A discussion of the specialized types of trusts utilized in Delaware planning including dynasty trusts, APTs, DINGs, BDITs, etc. This will include a discussion about the process of determining how and when each type of trust makes sense for your client.
Instructors: Daniel Hayward, Director, Gordon, Fournaris & Mammarella, PA; Todd A. Flubacher, Partner, Morris, Nichols, Arsiht & Tunnell LLP

Marketing Delaware: An Overview of Delaware and its Competition - 1 hr. 27 min.
A discussion of the laws of the various states currently competing with Delaware in the trust business. This course is meant to provide trust officers with a better understanding of why a limited number of states developing similar laws. Delaware is more and remains the preferred trust jurisdiction.
Instructors: David Diamond, President, The Northern Trust Company of Delaware; Thomas M. Forrest, President & CEO, U.S. Trust Company of Delaware

$199 each for Louisiana Bankers Assoc. Members or All Nine for Just $599! ($299/$799 each for non-members)
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