



ETHICS FORUM (VIRTUAL & IN-PERSON)

“PROTECTORS AND ADVISORS: NEGOTIATING THE ETHICAL LANDMINES OF TRUST ADMINISTRATION’S WILD WEST”

TUESDAY, JUNE 13, 2023

8:00 – 8:30 A.M. REGISTRATION & BREAKFAST BUFFET

8:30 – 10:30 A.M. PROGRAM

IN-PERSON PROGRAM

THE UNION LEAGUE
140 S. BROAD STREET
GRANT ROOM (1ST FLOOR)
PHILADELPHIA, PA

VIRTUAL PROGRAM

ZOOM WEBINAR
DETAILS TO BE SENT OUT THE DAY PRIOR
TO THE PROGRAM

The emergence of new roles in trust administration – such as trust protectors, trust advisors, distribution advisors and investment advisors – is a product of clients who see the traditional corporate trustee model as too limiting and the individual trustee model as lacking expertise and continuity. Clients are seeking ways to infuse trust administration with more flexibility and creativity in order to have access to the best and brightest thinking, to switch out functions that are not working and to be able to meet the administrative challenges of the uncharted financial, legal and familial territories ahead. Some professionals have referred to this new era of trust administration as the Wild West, where there are “no rules.” This year the Ethics Forum takes a look at these new roles and the ethical considerations in drafting and administering trusts populated with roles intended to effect change, when clients and their advisors may not really understand the world they are creating and how that new world may carry out the client’s mission.

Two Education Credit for CLE (ETHICS-PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speakers:

- Paul Heintz, Obermayer Rebmann Maxwell & Hippel LLP
- Linda Henry, Woodleave Wealth Process LLC
- Melinda G. Rath, Glenmede

The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

JUNE 13, 2023 HYBRID ETHICS FORUM REGISTRATION FORM

Registration Fee (same rate for In-Person or Virtual):

PEPC Members: \$45 Non-Members \$65

Continuing Education Credits Included in Registration Fee:

CLE Credit (Ethics)	CPA Credit
Insurance Credit	CTFA Credit
CFP® Credit	PACE Credit

No-shows will be billed. No refunds after June 9, 2023

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Participation Type: In-Person Virtual

CONTINUING EDUCATION INFORMATION:

CE Credits (2 credits offered)

Continuing Legal Education (2 ETHICS credits).....Attorney ID: _____

Insurance Continuing Education (2 credits).....License Number: _____

CFP® Continuing Education (2 credits)..... Last 4 Digits of SSN: _____

CTFA, PACE and CPA Certificates will be emailed to attendees after the webinar at no additional charge.

PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504

Register Online: www.philaepc.org

Questions: 215-486-6215
(Registrations will not be accepted via phone)