



2024 NBA Nevada Trust Conference
Preliminary Agenda

Monday, April 29

- 11:00 am Registration Open
- 1:00 PM Welcome
Nevada Trust Panel Presentation
- 2:00 PM Federal Tax Update, Professor Sam Donaldson
- 3:10 PM Practical Partnership Solutions to Common Client Situations, Paul Lee
- 4:00 PM Protecting Clients from Fraud and Scams, Professor Benjamin Edwards
- 5:00 PM Opening Reception with Exhibiting Sponsors

Tuesday, April 30

- 7:30 AM Breakfast with Exhibiting Sponsors
- 8:30 AM Nevada Planning Update, Michaelle Rafferty
- 9:30 AM Corporate Transparency Act, Bob Armstrong
- 10:35 AM Nevada Case Law, Alan Freer
- 11:30 AM Closely Held Business, Sam Donaldson
- 12:20 PM Lunch Exhibitors
- 1:30 Concurrent Sessions
 - Everything You Wanted to Know About Corporate Fiduciaries, Todd Hammond & Karen Sugihara
 - International Tax I, Bill Sherman
 - Charitable Planning, Martin Hall
- 2:25 Concurrent Sessions
 - Premarital Planning, Michaelle Rafferty
 - International Tax II, Joe Fernandez
 - QSBS, Joe Toce & Ray Thomson
- 3:30 Concurrent Sessions
 - Legacy Planning, Justin Miller
 - International Tax II, Enrique Hernandez
- 4:15 PM Ethics, Professor Benjamin Edwards

Wednesday, May 1

- 7:30 AM Breakfast with Exhibiting Sponsors
- 8:30 AM Reality Versus Scary Theory, Louis Harrison
- 9:30 AM The Nuts & Bolts of Fiduciary Accounting, Francine Lee
- 10:35 AM Insurance Planning
- 11:30 AM Planning with Derivatives, David Handler
- 12:20 PM Lunch with Exhibitors
- 1:30 Concurrent Sessions
 - SLATs, David Handler
 - Digital & Regulatory: Why Crypto Belongs in A Bank, Matt Wolf & Jay Schulman
 - Asset Protection, Tim Riley
- 2:25 Concurrent Sessions
 - Crossing State Lines I, Elise McGee
 - ACTEC Tax Updates I, Elizabeth Sevilla
 - Asset Protection: Bankruptcy, Sally Armstrong
- 3:30 Concurrent Sessions
 - Crossing State Lines II, Joe Viviano
 - ACTEC Tax Updates II, Dick Kinyon
 - Asset Protection, NINGS, Kirsten Simmons
- 4:15 Nevada Trust Company Panel Presentation

Nevada Trust Conference
April 29 – May 1, 2024
Caesars Palace, Las Vegas

Cost to Attend: \$1150, \$950 *SBA Member

Early Bird Discount \$950 \$875 *SBA member,
registration must be paid in full prior to March 29, 2024

Conference Registration:
www.nvbankers.org/trust

Hotel Reservations:
\$180 (+\$52.10 Resort Fee +13.38%Tax)
Reservation Link
<https://book.passkey.com/go/SCNEV4>

For guests that prefer to phone in their reservations, they may call the Reservation Center at 866-227-5944 to secure a reservation on your group block. The name of the group is listed as 2024 Nevada's Trust Conference. Callers may also use your group code to identify the group, **SCNEV4**.

*SBA rate applies to members of our
State Banking Association Partners:





2024 Nevada Trust Conference
Caesars Palace | Las Vegas, NV
April 29 – May 1, 2024

The 3rd annual Nevada Trust Conference will gather national and local experts to share updates for tax, estate and trust planners.

Nevada’s growing trust industry continues to make it the jurisdiction of choice for many individuals and institutions alike. The Nevada legislature, judiciary, and state officials have reinforced their commitment to the endurance and security of the trust industry in Nevada.

Based on previous events, we anticipate approval for up to 20 hours of continuing education credits for legal, CPA, CFTA, CFP and other designations, including 2 hours of ethics credits.

Registration is open at www.nvbankers.org/trust

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