

2009 Trust & Investment Conference

The Otesaga Hotel
Cooperstown, New York
September 15-17, 2009

Sponsored by:
New York Bankers Association

Managing Business and Client Expectations in a Changed Environment

NYBA's 63rd Annual Trust & Investment Conference is the industry's premier in-state forum for trust and investment executives. It's your chance to hear from leading experts on the latest fiduciary and regulatory challenges, as well as best practices and strategies for managing your business and supporting your clients in a challenging economic environment.



Program Benefits

- ◆ Gain new insights into investing fiduciary assets during volatile market conditions
- ◆ Explore the latest legislative and regulatory initiatives and assess the impact on your organization and your clients
- ◆ Return to your office with tools and strategies to add value to your business and to your clients

Topic Highlights

- Legislative & Regulatory Environment: Current Issues and the Outlook for 2010
- Attitudes of Investors on Surviving the Economic Crisis
- New York's New Power of Attorney Law: The Impact on Trust Departments
- Planning for the Unknown in 2010 and Beyond
- Fiduciary Liability and Litigation
- Fiduciary Investing in a Challenging Environment: Has the Game Changed?

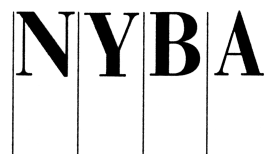
Presenters (partial list)

- **David E. Adler**, Author, *Snap Judgment: When to Trust Your Instincts, When to Ignore Them, and How to Avoid Making Big Mistakes with Your Money*
- **John D. Dadakis**, Esq., Schiff Hardin, LLP
- **Charles D. Fox IV**, Esq., McGuire Woods LLP
- **Kathryn Grant Madigan**, Esq., Levene, Gouldin & Thompson, LLP
- **Benjamin A. Pace**, Managing Director & Chief Investment Officer, Deutsche Bank Private Wealth Management
- **George H. Walper, Jr.**, President, Spectrem Group

CTFA , CLE, CFP credit will be applied for.

The New York Bankers Association is registered with the New York State Board for Public Accountancy as a sponsor of continuing professional education (CPE).

New York Bankers Association
99 Park Avenue, 4th Floor
New York, NY 10016
www.nyba.com



Program

Tuesday, September 15, 2009

Pre-Conference Golf at the Leatherstocking Golf Course - Tee times starting at 12:00 noon

5:30—7:00 pm—Registration

6:00—7:00 pm—Committee Meetings

7:00—9:00 pm—Reception and Dinner

Wednesday, September 16, 2009

7:00—8:15 am—Breakfast in Hotel Dining Room

8:30—10:10 am

Welcome

Gail E. Cohen, Chair, NYBA Trust & Investment Division; Executive Vice President, General Trust Counsel & Head, Global Wealth Management, Fiduciary Trust Company International

Michael P. Smith, President & CEO, New York Bankers Association

Legislative & Regulatory Environment: Current Issues and Outlook for 2010

Victor D. Xistris, Chair, NYBA Trust Legislative & Regulatory Committee; Managing Director, New York Private Bank & Trust

Joseph F. Denara, Chair, NYBA Trust & Estate Tax Committee; Managing Director, JP Morgan Chase Bank, N.A.

William J. Bosies, Senior Vice President-Legislation, New York Bankers Association

10:10—10:30 am—Refreshment Break

10:30—12:00 noon

Attitudes of Investors on Surviving the Economic Crisis
George H. Walper, Jr., President, Spectrem Group

12:00—1:15 pm—Luncheon in Hotel Dining Room

1:15—2:15 pm

New York's New Power of Attorney Law: The Impact on Trust Departments

Kathryn Grant Madigan, Esq., Levene Gouldin & Thompson LLP

2:15—2:30 pm—Refreshment Break

2:30—4:30 pm

Fiduciary Liability and Litigation

John D. Dadakis, Esq., Schiff Hardin, LLP

Snap Judgment: Why Your Instincts Can Be Your #1 Enemy and Other Topics in Behavioral Economics

David E. Adler, Author, *Snap Judgment*

6:30—7:15 pm—Reception

7:15—9:00 pm—Dinner

Thursday, September 17, 2009

7:00—8:15 am—Breakfast in Hotel Dining Room

8:30—10:00 am

Planning for the Unknown in 2010 and Beyond

Charles D. Fox IV, Esq., McGuire Woods LLP

10:00—10:15 am—Refreshment Break

10:15—11:45 am

Fiduciary Investing in a Challenging Environment: Has the Game Changed?

Gail E. Cohen, Executive Vice President & General Trust Counsel, Fiduciary Trust Company International

Benjamin A. Pace, Managing Director & Chief Investment Officer, Deutsche Bank Private Wealth Management

Election of Division Officers for 2009-10

11:45 am—Conference Adjourns

Check for program updates at:
www.nyba.com/education/2009_TRUSTConf.html

Questions

Elisa R. Legg—212-297-1679; elegg@nyba.com

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Registration

- \$450 per registrant—members
- \$395 per registrant—advt'l members
- \$700 per registrant—non-members

Fee covers the cost of conference sessions, receptions, refreshments, group meal charges and conference materials.

Mail or fax completed registration form, along with payment, to:

Trust & Investment Conference
New York Bankers Association
99 Park Avenue, 4th Floor
New York, NY 10016

Any registration cancelled on or after August 24, 2009, is subject to a 25% cancellation fee. Registrations cancelled prior to August 24 will be refunded in full. Fee will not be refunded for cancellations after September 4. There is no charge for substitutions.

Directions are available at:
www.nyba.com or www.otesaga.com

Golf Don't miss the chance to play an extraordinary round of golf at the Leatherstocking Golf Course, one of the east's most scenic and challenging courses. Sign up on the Golf Form.

The Otesaga Hotel

The historic **Otesaga Hotel** occupies 700 feet of lakefront on the southern shore of Lake Otsego. The hotel was selected as a member of the prestigious Historic Hotels of America by the National Trust for Historic Preservation and continues to receive the coveted AAA Four Diamond Award for providing exceptional accommodations, excellent service and an elegant atmosphere.

For reservations, complete the enclosed form and return it directly to The Otesaga.