

Sunday June 6	Monday June 7	Tuesday June 8	Wednesday June 9
	7:15 am Breakfast	7:15 am Breakfast	7:15 am Breakfast
	8:30 am Fiduciary Powers – Principal and Income <i>Rizzo</i>	8:15 am Fiduciary Income Taxes <i>Roman</i>	8:30 ó 9:00 am Exam
	10:15 am Discretionary Payments- Principal & Income <i>Fodera/Radigan</i>	10:15 am Transfer Taxes – Estate, Gift & GST <i>Christerson</i>	9:15 am Administrative Duties of a Trustee <i>Abate/Masters</i>
2:00 ó 2:30 pm Registration	12:00 Noon Lunch	12:00 Noon Lunch	
2:30 ó 4:30 pm Welcome & Overview Types of Trusts <i>Johnson</i>	1:00 pm Fiduciary Liability <i>Radigan/Fodera</i>	1:00 pm Administering Unique Assets <i>Radigan</i>	10:45 am Relationship Management <i>Scaturro/Tsavaris</i>
4:45 - 6:00 pm Duties of a Trustee <i>Ward</i>	2:45 pm Powers of Appointment <i>Overbeck</i>	2:15 pm Terminations/ Accountings <i>Fornasar</i>	12:00 noon Adjournment
6:15 ó 7:30 pm Reception/Dinner	4:00 ó 5:30 pm Investments <i>Doty</i>	3:30 ó 5:00 pm Compliance & Account Acceptance <i>Collins</i>	
	6:00 pm Dinner	6:00 pm Dinner	
7:30 ó 8:30 pm Seminars - Ethical Issues in Trust Administration	7:30-9:00 pm Seminars – Trust Document Analysis	7:30-9:00 pm Optional Review Session	