



**HOTEL RESERVATION
INFORMATION**

EDEN RESORT & SUITES

222 EDEN ROAD

LANCASTER, PA 17601

Phone: 717-569-6444

Online: www.edenresort.com

**SPECIAL RATES ARE FOR
RESERVATIONS MADE NO LATER
THAN APRIL 17TH, 2022**

Use code 2205FIDUC

Group Block Name: Fiduciary Education
Foundation Room Block for 2022

*The cost of the room and incidentals are
not included in the conference fee. Meals
and refreshments noted on the program
are included.*



FIDUCIARY EDUCATION FOUNDATION

P.O. BOX 220

INDIANA, PA 15701



FIDUCIARY EDUCATION
FOUNDATION
PRESENTS THE

2022

**CONTINUING
EDUCATION
CONFERENCE**

MAY 17TH -20TH

LOCATION:

EDEN RESORT & SUITES

222 EDEN ROAD

LANCASTER, PA

www.fiduciaryeducationfoundation.com

Questions : Phone Elaine Bohatch

724-836-7670 or email

ebohatch@cbthebank.com

Tuesday May 17th

5:30- PM Registration Begins
7:00 PM Cocktails
7:30 PM Let's Talk Crypto
John Valkovci - St Francis University

Wednesday May 18th

7:30-8:30 AM Registration/Breakfast
8:30-8:45 AM Opening Remarks

8:45 AM Intergenerational Wealth Transfer Maria Quinn—Vanguard

9:45 AM ILIT and Estate Planning
John Barkhurst - ITM

11:00AM Topic TBD - Speaker TBD

12:00 PM Lunch

1:15 PM Fiduciary Subjects of Marijuana Stephen J. Olsen -
Gawthrop Greenwood PC

2:15 PM Commodities & Inflation ST Disruption with LT Implications
James Wilson -Harbor Capital

3:45 PM Recent Trust/Tax Updates Qualified Plans John E. McGrady III—
Buchanan Ingersol & Rooney PC

Wednesday Evening

5:30-6:00 PM Cocktails
6:00 PM Dinner and Speaker

Recent Economic Updates/Outlook

Malcolm E. Polley —

Stewart Capital Advisors LLC

Thursday May 19th

7:00 AM Breakfast

8:00 AM Digital Assets

Patrick Alyward RIC

9:00 AM ESG Investing

It's Inevitable-It's Now

Linda Duessel -Federated-Hermes

10:15 AM Topic TBD Speaker TBD

11:15 AM Trends in Trust

Mike Tropeano— Broadridge

12:15 Lunch

1:30-3:30 Fiduciary Trust /Tax Recent Developments

Charles A Redd— Clary Stinson LLP

3:30 BREAK

3:45 Cont.. Recent Developments

Charles A. Redd—Stinson LLP

Friday May 20th

7:00-8:00 AM—Breakfast

8:00 AM Special Needs and Elder Planning

Lauren Cascino Presser -

Ayres Presser Elder Law, LLC

9:00 AM Internet Security/Cyber Attacks Jeremy Burriss—Snodgrass

10:15 AM Behavioral Health- Building Resilience

Rachel Vucic—Well Span Philhaven

11:15 AM Financial Planning and Behavioral Finance

Renee Laychur

12:15 PM Closing Remarks

Estimated Continuing Education Credits
CTFA 20 & CFP 18

Conference Fee \$450

Payable by credit Card Online :

Fiduciaryeducationfoundation.org

Or:

Make Checks Payable to

FEF

c/o S&T Wealth Management

PO Box 220 Indiana , Pa 15701