



**HOTEL RESERVATION
INFORMATION**

EDEN RESORT & SUITES

222 EDEN ROAD

LANCASTER, PA 17601

Phone: 717-569-6444

**SPECIAL RATES ARE FOR
RESERVATIONS MADE NO LATER
THAN APRIL 17, 2023**

Use code 2305FIDUC

Group Block Name: Fiduciary Education
Foundation Room Block for 2023

*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 2023**

**CONTINUING
EDUCATION
CONFERENCE**
May 17th -19th

LOCATION:

EDEN RESORT & SUITES
222 EDEN ROAD
LANCASTER, PA

www.fiduciaryeducationfoundation.com

Contact: Elaine Bohatch 724-836-7670 or
email: ebohatch@cbthebank.com

Wednesday May 17th

7:00 AM Registration/Breakfast

8:30 AM Opening Remarks

8:45 Health Care and your Retirement

Julia Fuentes Vanguard

9:45 Interest Rates and the Economy

Harbor Speaker TBD

10:45 Break Crystal Ballroom

11:00 Digital Asset Management

John Valkovci Asset Reality;

St Francis University

12:00 Lunch Crystal Ballroom

**1:15 Module 1: Creating NFT's Module 2:
Virtual Asset Regulatory Update --John
Valkovci Asset Reality**

**2:15 Fiduciary Litigation and Law Updates
Nora Chatha Esquire Tucker Arensberg
P.C.**

3:15 Break Crystal Ballroom

3:30 Financial Planning

Robert Thompson

5:30 Cocktails and Dinner Crystal Ballroom

6:30 Economic Outlook

Malcolm E. Polley Stewart Capital

Advisors LLC

Thursday May 18th

7:00 AM Breakfast

8:00 Current Economic Data and News

Philadelphia Federal Reserve Kali Aloisi

**9:00 Economic and Market Outlook: It all
depends on your Time Frame**

Linda Duessel CFA Federated Hermes

10:00 Break Courtyard

10:15 The importance of Asset Allocation

Stephen Soper Wright Investors' Service

11:15 Life Care Planning

Esquire Anthony L. Marone

12:15 Speaker - Lunch Courtyard

Be Fearless—Linda Duessel CFA

Federated Hermes

**1:30 "Stepping up" your Estate Settlement
Process —Patrick Alyward Atticus**

2:30 Internet /Wireless Security

Jeremy Burriss Snodgrass

3:30 Break Courtyard

3:45 Wallet Share

Northern Trust SPEAKER TBD

Friday May 19th

7:00 AM Breakfast Courtyard

8:00 Fiduciary Tax Planning

Attorney Andrew S. Rusniak

9:00 Special Needs Planning

Attorney Lauren Presser

10:00 Break Courtyard

10:15 Financial Planning for the

New Normal Renee Laychur CFA

Woodlands Bank

**11:15 Stock Selection in today's economic
climate Kim Forrest**

12:15 Closing Remarks

**Estimated Continuing Education Credits
CTFA 20 & CFP 18**

Conference Fee \$500.00

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