

On-Demand

***Presented by Counsel for Bankers' Compliance Group®
ALDRICH & BONNEFIN, PLC****

2026 Webinar Doing Business with Family Trusts

Originally presented on
Tuesday, August 11, 2026
(2.0 hours)

Presented by
Keith R. Forrester, Esq.
Principal of Aldrich & Bonnefin, PLC



WHO SHOULD ATTEND?

New accounts staff, compliance officers,
risk managers, in-house counsel, operations officers,
loan officers, note department staff,
relationship managers, and internal auditors

The number of people creating family trusts is increasing largely due to attempts to avoid the time, cost, and complications associated with going through probate. As a result, financial institutions face more and more questions on how to deal with trusts and trustees.

To make matters more difficult, the trusts themselves are becoming increasingly more complicated, especially when the death of a trustor triggers a split of the trust into multiple trusts.

Join us for this Webinar as we discuss trusts in detail and address issues associated with providing financial services to trusts in both the lending and new accounts contexts.

As with all of our Webinars, registrants will be able to download a detailed discussion outline to refer to during the program.

Highlighted areas will include:

- Parties to a trust
- Revocable vs. Irrevocable trust
- The importance of a Certification of Trust
- Proper completion of the Certification of Trust
- Performing CIP on a trust
- Managing the account of the trust when a trustor or trustee dies
- How to deal with the account of a trust when the trust splits into multiple trusts
- Issues when a trustee attempts to grant a power of attorney
- Consequences of trust revocation

ON-DEMAND STREAMING AVAILABLE

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&
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* Janet Bonnefin has retired from the firm.

Doing Business with Family Trusts — On-Demand

ON-DEMAND WEBINAR

This Webinar was originally presented on August 11, 2026. There will be no live Q&A sessions but the recording does include the recorded Q&A sessions. This program is 2.0 hours in length.

Member Status	On-Demand Pricing
BCG Member	\$350.00
BCG Non-member	\$430.00

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PAYMENT

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ACCREDITATION

(Continuing Education credit will be provided only to the registrant)

MCLE: As an added benefit we are offering this Webinar to in-house attorneys for MCLE credit. This activity has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of **2.0 hours**. Aldrich & Bonnefin certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education.