

On-Demand

2024

Webinar

Doing Business with Family Trusts

Originally presented on
Wednesday, October 30
(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

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

In an attempt to avoid the time, cost and complications associated with going through probate, it is very commonplace today for people to create family trusts and place their assets, including deposit accounts, in the trust. What's more, the trusts themselves are becoming increasingly more complicated, especially when the death of a trustor triggers a split of the trust into multiple trusts.

As a result, financial institutions face more and more questions on how to deal with trusts and trustees. This in turn requires the institution employees to have a better and more detailed working knowledge of the law and operational requirements applicable to trusts.

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

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

Highlights:

- The parties to a trust
- The practical difference between a revocable and irrevocable trust
- Power and authority of the trustee
- Liability when the trustee exceeds that power and authority
- The ability of a trustee to grant a power of attorney
- Proper completion of a Certification of Trust
- How to handle the death of a trustee and a trustor
- Issues when a marital trust splits into sub-trusts

ON-DEMAND STREAMING AVAILABLE

ALDRICH
&
BONNEFIN

Professional Law Corporation™

BANKERS' COMPLIANCE GROUP®

phone: 800.742.3600

fax: 949.474.0617

Email: info@bankerscompliancesgroup.com



*Janet Bonnefin has retired from the firm.

Doing Business with Family Trusts—On-Demand

ON-DEMAND WEBINAR

This Webinar was originally presented on October 30, 2024. 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	\$335.00
BCG Non-member	\$435.00

REGISTRATION

BCG Members: To register, contact your institution's Main Contact or, if authorized, log in at <https://register.bankerscompliancegroup.com/subadmin> and select "On-Demand Events." Registrants will receive an email with instructions on how to access the On-Demand Webinar and download the materials within approximately 24 hours after the purchase has been made.

BCG Non-members: If your institution has previously registered for a BCG event, using your institution's username and password, log in at <https://register.bankerscompliancegroup.com/subadmin> and select "On-Demand Events." Registrants will receive an email with instructions on how to access the On-Demand Webinar and download the materials within approximately 24 hours after we have confirmed your payment has been received.

If you have not established an online event registration account, contact Katrina Jensen at 800-742-3600 or email her at info@bankerscompliancegroup.com to obtain a username and password.

PAYMENT

BCG Members: This On-Demand Webinar is offered to BCG Members on an optional basis. We will include the registration fee on the BCG Member's monthly BCG invoice.

BCG Non-members: Non-members may pay by credit card or check. To pay by credit card, follow the credit card instructions during the online registration process. Major credit cards are accepted. To pay by check, make checks payable and mail to **Aldrich & Bonnefin, PLC, P.O. Box 19686, Irvine, CA 92623-1029**, and indicate the event for which you are registering. Registrants will receive an email with instructions on how to access the On-Demand Webinar and download the materials within approximately 24 hours after we have confirmed your payment has been received.

CANCELLATION POLICY

BCG Members: Once you click "Save" on the registration page, your registration fee is non-refundable.

BCG Non-members: Once your payment for the On-Demand Event is complete, your registration fee is non-refundable.

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.