



WHERE TRUST MEETS INNOVATION

Midwest Trust & Wealth Management Conference October 14–16
Ann Arbor Marriott Ypsilanti at Eagle Crest • Ypsilanti, Michigan

Join the Midwest's Leading Trust & Wealth Professionals

The Midwest Trust & Wealth Management Conference brings together trust officers, wealth advisors, estate planning professionals, investment managers, and financial leaders from across the Midwest for three days of education, networking, and innovative ideas that are shaping the future of fiduciary services. Connect with professionals from across the Midwest while building valuable relationships.

Co-hosted by:

- Michigan Bankers Association
- Illinois Bankers Association
- Ohio Bankers League
- Indiana Bankers Association

Featured Educational Sessions

- Economic Outlook: Current Conditions and What's Ahead
- Directed Trusts and Divided Fiduciary Roles
- Elder Fraud Scams
- Decanting & Trust Modification
- Case Law Update
- Common Trust Examination Findings
- From Overwhelmed to Optimized with AI

- Redefining the Client as "The Family"
- Selling Highly Appreciated Assets Without Capital Gains Tax
- Trust Administration Risks & Best Practices
- Protecting Assets from Long-Term Care Costs

Why Attend?

- ✓ Learn from nationally recognized industry experts
- ✓ Stay ahead of regulatory, fiduciary, and tax developments
- ✓ Explore AI, investment strategies, and emerging trust trends
- ✓ Earn continuing education credits
- ✓ Meet industry partners in the Sponsor and Exhibitor Showcase

Agenda Overview

Wednesday, October 14

1:00 p.m. Tee Times

6:00 p.m. Welcome Mixer

Thursday, October 15

8:00 a.m. Welcome Breakfast

8:30 - Noon General Sessions

Noon Lunch

1:00 - 4:00 p.m. General Sessions

4:00 p.m. Reception with Exhibitors

Friday, October 16

7:30 a.m. Breakfast

8:00 - 11:00 a.m. General Sessions



Ann Arbor Marriott Ypsilanti at Eagle Crest

Nestled along the shores of Ford Lake, Eagle Crest offers beautiful lakeside accommodations, championship golf, and convenient access to Ann Arbor, creating the perfect setting for learning and networking.



Eagle Crest Marriott

1275 S Huron St, Ypsilanti, MI 48197

(734) 487-2000

[Reserve online](#) \$189/night discounted room rate.