



2025 Trust & Wealth Management Conference



Wednesday, May 21, 2025

Registration: 9:00 a.m.
Business Session: 9:30 a.m. – 3:00 p.m.

**Courtyard by Marriott
Columbia Downtown at USC**
630 Assembly Street
Columbia, South Carolina

Please Register Before May 16, 2025

**THIS CONFERENCE HAS BEEN SUBMITTED FOR APPROVAL FOR:
CLE CREDIT HOURS, CERTIFIED TRUST AND FINANCIAL ADVISOR CREDITS, AND CPE CREDITS.**

2025 TRUST AND WEALTH MANAGEMENT CONFERENCE

Wednesday, May 21, 2025 | Courtyard by Marriott Columbia Downtown at USC

The SCBA Trust Committee is proud to announce the 2025 Trust and Wealth Management Conference. Our program is designed to benefit trust department and wealth management personnel at all levels.

TOPICS INCLUDE:

- Certified Case Managers/Aging Life Care Professionals: Complementing the Trust Officer's Expertise
- Update to SC's Rule Against Perpetuities and Trust Issues
- Protecting Assets and Saving Taxes – Innovative Strategies Unfamiliar to Most
- Navigating the Fog of (a Trade) War
- ...And More!

CONFERENCE AGENDA

9:00 a.m.....	Registration / Coffee and Pastries
9:30 a.m.....	Business Session
Noon	Luncheon
3:00 p.m.....	Adjournment

CONFERENCE EXHIBITORS

GOLD

**Federated
Hermes** 

SILVER


CAROLINA
ADVOCACY GROUP

Exencial
Wealth Advisors™

 **proxytrust**

 **FIS**

COST

South Carolina Bankers
Association members: \$395
Non-members: \$825

PLEASE REGISTER BEFORE MAY 16, 2025

Lunch is included in the registration fee.

Due to necessary commitments and expenses, there will be no refund of registration fees after 12 noon on May 16, 2025.

SUBSTITUTIONS CAN BE MADE.

If you have questions, please call the SCBA at 803.779.0850

ABOUT OUR SPEAKERS



RANDY E. FISHER, ESQUIRE, THOMAS, FISHER & EDWARDS, P.A.

Randy Fisher is a Certified Specialist in taxation law as well as estate planning and probate law, making him one of only 17 attorneys in South Carolina to hold dual certification. He is one of only a few SC attorneys who has chaired both advisory committees tasked with supervising the certification process for these specialized practice areas. Before age 40, Randy was selected as a Fellow of the American College of Trust and Estate Counsel (ACTEC), elected Chair of the Tax Law Section of the South Carolina Bar, designated by the South Carolina Supreme Court as Chair of its Taxation Law Specialization Advisory Board, and recognized by Best Lawyers in America®. He has been honored by Best Lawyers® every year for 20 years. www.tfelawfirm.com



MARSHALL T. MINTON, ESQUIRE, SPECIAL COUNSEL, BLAIR CATO PICKREN CASTERLINE

Marshall Minton is Special Counsel, assisting clients with estate planning, tax planning and probate matters out of the Columbia office. In addition to estate planning, Marshall's legal career includes serving as Counsel for Litigation with the SC Department of Revenue, representing clients in probate litigation, assisting clients with business planning and tax planning, helping clients navigate incapacity issues of their loved ones, as well as, advising on bank operations and corporate trustee matters. Each of these areas of experience allows Marshall to provide a wealth of knowledge in many different aspects of her client's estate plan. blaircato.com



KAREN NICHOLS, RN, CARE MANAGER, AGING LIFE CARE CHARLESTON

Karen Nichols brings over 20 years of experience serving seniors across South Carolina. With degrees in Psychology and Nursing, she has led initiatives in person-centered care at both state and national levels. Karen helped design and manage The Cottages at Brushy Creek and Cascades Verdae, and held leadership roles in long-term care and geriatric mental health. Now a full-time member of the Aging Life Care Charleston team, she is the only certified Teepa Snow Positive Approach to Care trainer in the Lowcountry. Karen is also a certified care manager and MoCA-certified for cognitive assessment. aginglifecarecharleston.com



BONNIE NOBLE SILBERMAN, OWNER, GERIATRIC RESOURCE SERVICES

Bonnie Silberman is a licensed Master Social Worker and Certified Aging Life Care Professional™. A Michigan native, she holds both a Master's and Bachelor's in Social Work from Wayne State University. With a passion for community service, Bonnie has served on the boards of Meals On Wheels, Greenville Area Parkinson's Society, and the South Carolina chapter of the National Association of Social Workers. Her professional background includes work with families and individuals with developmental disabilities, teaching Human Services, and experience in subacute care and Home Health. Bonnie specializes in assessment, care planning, and guiding families through the complexities of aging, with a focus on helping individuals live well during their later years. geriatricresourceservices.com



WALTER B. TODD III, PRESIDENT & CIO, GREENWOOD CAPITAL

Walter Todd is President and Chief Investment Officer of Greenwood Capital, one of the largest independent registered investment advisory firms headquartered in South Carolina, with \$1.7 billion in assets under management. He oversees Greenwood Capital's disciplined top-down macro-economic investment philosophy and its highly-experienced Investment Team, delivering a diverse offering of investment objective based ETF Asset Allocation Strategies, as well as traditional Equity and Fixed Income Investment Strategies. He has 30 years of experience in the financial industry. Walter is regularly featured on Bloomberg, Bloomberg Radio, Fox Business, and BBC, as well as quoted through Reuters, the Associated Press, Bloomberg and other national and international print, radio and television outlets. www.greenwoodcapital.com

Please register the following person(s) for the **2025 TRUST & WEALTH MANAGEMENT CONFERENCE** to be held Wednesday, May 21, 2025, at Courtyard By Marriott Columbia Downtown At USC, 630 Assembly Street, Columbia, South Carolina.

Registration fees: \$395 for members / \$825 for non-members

Total number of registrants:

**PLEASE REGISTER BEFORE
MAY 16, 2025**

**Call 803.779.0850 or visit
www.scbankers.org.**

For additional questions or sponsorship opportunities, please contact Anne Gillespie at agillespie@scbankers.org.

NAME AND NICKNAME _____

ADDRESS, CITY, STATE, ZIP _____

PHONE & EMAIL ADDRESS _____

BANK OR FIRM _____

NAME AND NICKNAME _____

ADDRESS, CITY, STATE, ZIP _____

PHONE & EMAIL ADDRESS _____

BANK OR FIRM _____

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ADDRESS, CITY, STATE, ZIP _____

PHONE & EMAIL ADDRESS _____

BANK OR FIRM _____

METHOD OF PAYMENT

☐ CHECK—PLEASE MAKE PAYABLE TO SCBA ☐ VISA ☐ MASTERCARD ☐ DISCOVER ☐ AMERICAN EXPRESS

CREDIT CARD # _____ EXP. DATE _____ V-CODE (LAST 3 DIGITS) _____

SIGNATURE _____ DATE _____ BILLING ZIP CODE _____

Due to necessary commitments and expenses, there will be no refund of registration fees after noon on May 16, 2025. SUBSTITUTIONS CAN BE MADE.

NOTE: Images captured at this event may be used to market next year's event, in the SCBA's Palmetto Banker magazine and/or on social media. I consent to the use of images that may contain my likeness for promotional purposes.

HOW TO REGISTER

MAIL TO:

SCBA
P.O. Box 1483
Columbia, SC 29202-1483

FAX TO:

SCBA
803.779.0890

INTERNET:

www.scbankers.org
go to "Education
and Events"

****If you have a disability that may affect your participation in this event, please attach a statement regarding those needs. We will be happy to contact you to discuss accommodations. Also, contact the SCBA for special dietary needs.**



P.O. Box 1483
Columbia, S.C. 29202-1483
Phone: 803.779.0850
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