2026 Graduate Texas Trust School ~ SMU Collins Executive Education Center

Monday, July 20	Tuesday, July 21	Wednesday, July 22	Thursday, July 23	Friday, July 24
8:30 – 9:30 a.m. Orientation @ SMU	8:00 – 10:15 a.m. Income Taxation of Estates and Trusts	8:00 – 10:00 a.m. Discretionary Distributions	8:00 – 9:00 a.m. Insurance Concepts	8:00 – 9:40 a.m. Administration Pitfalls
9:30 – 10:45 a.m. Fiduciary Litigation				
10:45 – 11:00 a.m. Break	10:15 – 10:30 a.m. Break	10:00 – 10:15 a.m. Break	10:00 – 10:15 a.m. Break	9:40 – 9:45 a.m. Break
11:00 a.m.– 12:30 p.m. Estate Administration	10:30 a.m. - 11:45 a.m. Estate, Gift and Transfer Tax	10:15 a.m.– 12:00 p.m. Estate Planning II	10:15 – 11:45 a.m. Marital & Bypass Trusts	9:45 – 10:45 a.m. OCC Regulatory Hot Buttons
12:30 – 1:45 p.m. Lunch (finish eating by 1:30)	11:45 a.m. – 1:00 p.m. Lunch	12:00 – 1:15 p.m. Lunch	11:45 a.m. – 1:00 p.m. Lunch	10:45 – 11:30 a.m. Study Break
1:45 – 3:45 p.m. Elderly/Disability Issues and Medicaid, SSI & SSDI	1:00– 2:30 p.m. Generation Skipping Trust	1:15 – 2:45 p.m. Accounting for a Fiduciary Entity	1:00 – 2:45 p.m. Tax Sensitive Investments	11:30 a.m. – 1:30 p.m. Final Exam
		2:45 – 4:15 p.m. Building New Relationships		
3:45 – 4:15 p.m. Study Break	2:30 – 3:00 p.m. Study Break	4:15 – 4:45 p.m. Study Break	2:45 – 3:15 p.m. Study Break	
4:15 – 5:30 p.m. Powers of Attorney & Fiduciary Duties	3:00 – 4:30 p.m. Ownership & Transfer Law	4:45 – 5:45 p.m. Advanced IRA	3:15 – 4:30 p.m. Economic & Market Overview	
			4:30 – 5:15 p.m. Alternative Investments	

Class Dinner Tuesday at 5:30pm @ SMU

Wealth Management & Trust