2026 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 – 9:30 a.m. Estate Fundamentals	8:00 – 10:00 a.m. Estate Planning I	8:00 – 9:00 a.m. IRA Basics	8:00 – 9:30 a.m. Charitable Trusts
			9:00 – 10:15 a.m. Introduction to Investments	9:30 – 9:45 a.m. Break
9:30 – 11:45 a.m. Introduction to Trusts & Types of Trusts	9:30 – 9:45 a.m. Break	10:00 – 10:15 a.m. Break	10:15 – 10:30 a.m. Break	9:45 – 11:15 a.m. Conflicts and Ethics
	9:45 – 11:45 a.m. Trust Operations	10:15 – 11:45 a.m. Grantor Trusts	10:30 -11:45 a.m. Investment Objectives, Asset Allocation & Planning	11:15 – 12:00 a.m. Study Break
11:45 a.m. – 1:00 p.m. Lunch	11:45 a.m. – 1:00 p.m. Lunch	11:45 a.m. – 1:00 p.m. Lunch	11:45 a.m. – 1:00 p.m. Lunch	12:00 p.m. – 2:00 p.m. Final Exam
1:00 – 3:00 p.m. Texas Trust Code	1:00 – 3:00 p.m. Personal Trust Administration	1:00 – 2:00 p.m. Insurance Trusts	1:00 – 2:30 p.m. Fiduciary Income Tax	
		2:00 – 3:30 p.m. Risk Management & Compliance	2:30 – 3:00 p.m. Study Break	
			3:00 – 3:45 p.m. Oil & Gas Management	
3:00 - 3:30 p.m. Study Break	3:00 – 3:30 p.m. Study Break	3:30 – 4:00 p.m. Study Break		
3:30 – 5:00 p.m. Texas Estates Code	3:30 – 5:15 p.m. Community Property	4:00 – 5:45 p.m. Special Needs Trusts	3:45 – 4:30 p.m. Real Estate Management	
			4:30 – 5:15 p.m. Farm & Ranch Management	

Class Dinner Tuesday at 5:30pm @ SMU

Wealth Management & Trust