

2024 Texas Trust School
SMU Collins Executive Education Center

Monday, July 22	Tuesday, July 23	Wednesday, July 24	Thursday, July 25	Friday, July 26
8:30 – 9:30 a.m. Orientation @ SMU	8:00 – 9:30 a.m. Estate Fundamentals Stephen Countryman	8:00 – 10:00 a.m. Estate Planning I Matthew Rittmayer	8:00 – 9:00 a.m. IRA Basics Patrice Konarik	8:00 – 9:00 a.m. Insurance Trusts David Reber
			9:00 – 10:15 a.m. Introduction to Investments Jeffrey Nelson	9:00 – 9:15 a.m. Break
9:30 – 11:45 a.m. Introduction to Trusts & Types of Trusts Matthew Badders	9:30 – 9:45 a.m. Break	10:00 – 10:15 a.m. Break	10:15 – 10:30 a.m. Break	9:15 – 10:45 a.m. Conflicts and Ethics Dian Kauth
	9:45 – 11:45 a.m. Trust Operations Cynthia Yeldell-Scott	10:15 – 11:45 a.m. Grantor Trusts Matt Beard	10:30 -11:45 a.m. Investment Objectives, Asset Allocation & Planning Jeffrey Nelson	10:45 – 11:45 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	11:45 a.m. – 1:45 p.m. Final Exam
1:00 – 3:00 p.m. Texas Trust Code Barney Jones	1:00 – 3:00 p.m. Personal Trust Administration Leslie Kiefer Amann	1:00 – 2:30 p.m. Charitable Trusts Alan Stroud	1:00 – 2:30 p.m. Fiduciary Income Tax John Round	
		2:30 – 4:00 p.m. Risk Management & Compliance Melody Bohlmann	2:30 - 3:00pm Study Break	
3:00 - 3:30 p.m. Study Break	3:00 – 3:30 p.m. Study Break	4:00 – 4:30 p.m. Study Break	3:00 – 3:40 p.m. Oil & Gas Management Paul Midkiff	
3:30 – 5:00 p.m. Texas Estates Code Brad Fletcher	3:30 – 5:15 p.m. Community Property Nelson Hunt	4:30 – 6:15 p.m. Special Needs Trusts Margaret Svoboda	3:40 – 4:25 p.m. Real Estate Management John Bailey	
			4:25 – 5:15 p.m. Farm & Ranch Management Mary Jane Rozypal	

Class Dinner Monday at 5:30pm @ SMU

