

# The Complete Fundamentals

September 16-17, 2024

TBA HEADQUARTERS AUSTIN, TEXAS



This introductory seminar combines elements from the prior Trust Fundamentals, Estate Fundamentals, and Investment Fundamentals programs into an efficient two-day format. This cost-effective seminar is perfect for newcomers to the trust field, internal auditors, administrative assistants, business development officers, and anyone with a desire to understand “the basics.”

## Trust & Estate Fundamentals

September 16 (8:30am – 4:30pm)

### Highlights

- Fiduciary and Agency Services
- Trust Administration
- Assets and Ownership
- Management and Regulation
- Fiduciary Wealth Transfer Taxation
- Terminology & Acronyms
- Aspects & Benefits of estate planning
- Identify the documents to estate planning
- Estate management and settlement

## Investment Fundamentals

September 17 (8:30 a.m. – 3:00 p.m.)

### Highlights

- Basic Investments
- Non-traditional Investments
- Securities
- Asset Allocation
- Determining Investment Objectives
- Investment Terminology
- Process of Portfolio Management

## About the Speakers

### Dian Kauth, JD, AEP

Trust & Estate Fundamentals is taught by Dian Kauth, Senior Vice President & Trust Advisor for Regions Private Wealth Management, with more than 33 years of banking experience, primarily in trusts.

### Brian Korb, PhD, CFA, CFP

Investment Fundamentals is taught by Brian Korb, Portfolio Manager & Senior Vice President for Broadway Bank, with more than 30 years of investment management and teaching experience.

---

## Enrollment Fee

### One Day:

\$425 Member • \$725 Nonmember

### Both Days:

\$695 member • \$1,575 Nonmember

## Location

### TBA Headquarters

203 W 10th St., Austin, TX 78701

# The Complete Fundamentals

September 16-17, 2024

TBA HEADQUARTERS AUSTIN, TEXAS

## REGISTRATION

REGISTER ONLINE AT [WWW.TEXASBANKERS.COM/TRUST](http://WWW.TEXASBANKERS.COM/TRUST) OR COMPLETE A SEPARATE FORM FOR EACH REGISTRANT

Mail: Texas Bankers Association • P.O. Box 2569 • Austin, Texas 78768-2569

Email: [trust@texasbankers.com](mailto:trust@texasbankers.com) • Phone: 512-472-7391

REGISTER ONLINE AT [WWW.TEXASBANKERS.COM/TRUST](http://WWW.TEXASBANKERS.COM/TRUST)

Name  Mr.  Ms.

Title

Bank or Company

Street Address

City, State, Zip

Mailing Address (if different from above)

City, State, Zip

Phone

Email Address

To expedite your registration, please include any other names you have used (i.e. maiden name, formal name or nickname) and, if applicable, any other financial institutions you have previously worked for.

Other Names

Other Financial Institutions

Please note any special accommodations below (i.e. ADA, food allergies, dietary requests, etc.):

### Enrollment Fees (please check selections)

#### Day One Only (September 17)

\$425 Member  \$725 Nonmember

#### Day Two Only (September 18)

\$425 Member  \$725 Nonmember

#### Both Days

\$695 Member  \$1,575 Nonmember

### Cancellation Policy

All requests for refunds must be submitted in writing. Please email to [trust@texasbankers.com](mailto:trust@texasbankers.com). Full registration fees will be refunded if written notice is received no later than **September 6, 2024**. There is no refund after this date. Extenuating circumstances are reviewed on an individual basis. Substitutions are permitted without added cost or penalty.

### Nearby Hotels

Austin hotels can fill up fast. Make your reservation early for better rates and to guarantee availability. WMT has secured a corporate rate for the following hotels:

#### The Otis Hotel – Autograph Collection

\$339/night

1901 San Antonio St., Austin 78705

<https://bit.ly/TBAAustinHotels>

#### AC Hotel Austin – University

\$259/night

1901 San Antonio St., Austin 78705

<https://bit.ly/TBAAustinHotels>

#### Moxy Austin – University

\$239/night

2552 Guadalupe St., Austin 78705

<https://bit.ly/TBAAustinHotels>

#### The Stephen F. Austin Royal Sonesta Hotel

701 Congress Ave., Austin 78701

Promo Code: SBP (12% off the best available rate for the days selected)

[tinyurl.com/23SFAHotelCompleteFund](https://tinyurl.com/23SFAHotelCompleteFund)

### Consent to use photographic images

Registration and attendance at, or participation in, this meeting constitutes an agreement by the registrant to TBA's use and distribution (both now and in the future) of the registrant's or attendee's image or voice in photographs, video, electronic reproductions and audio of such event.