Executive Development Institute
OWEN GRADUATE SCHOOL OF MANAGEMENT

Vanderbilt Executive Development Institute

Wealth Management Series

Family Trusts: Beyond Technical Proficiency

March 7-8, 2016

A two-day program to help develop your trust management strategy

Trusts offer tax advantages, privacy, and asset protection. These advantages make them the central vehicle for succession planning and family wealth transfer. However, despite these technical advantages, trusts can create conflict when the complexities that they pose to the relationships of parents, children, siblings, and advisors go unaddressed. This two-day program will focus on building successful relationships among grantors, trustees, and beneficiaries and defining the responsibilities that each has to play towards the long-term health of the family.

The bottom line value to you and your family

This program will offer a unique focus on the human side of successful trust integration. Through lectures, seminar-style discussions, exercises and case studies, each participant will have the opportunity to learn to:

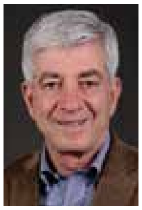
- Recognize the roles and responsibilities of the grantor, trustee and beneficiary.
- Learn methods for increasing effective communication and promoting healthy trust relationships.
- Create trusts that express the clear intent of the grantors.
- Understand the pros and cons of different types of trustees.
- Use communication to manage risk, protect the trustee from litigation, and preserve the grantors' intentions.
- Assemble an effective trust team.

Course Instructors:

Keith Whitaker Ph.D.
Adjunct Professor, Owen Graduate School of Management, Vanderbilt University

Keith Whitaker is an educator and philanthropist. He consults to enterprising families on succession planning, developing rising generation talent, and communicating during estate planning.

He has served as a Managing Director at Wells Fargo Family Wealth, a philosophy professor at Boston College, a trustee, and a director of a private foundation. His writings have appeared in *The Wall Street Journal*, *The New York Times*, *The Financial Times*, and *Philanthropy Magazine*. He is co-author of *The Cycle of the Gift*, *The Voice of the Rising Generation*, and *Family Trusts*, all published by Bloomberg Press.



Hartley Goldstone J.D., MBA
Associate, Wise Counsel Research, Trustscape LLC

Hartley Goldstone has served high net worth families for 30 years. Today, he consults to grantors, trustees and inheritors in all stages of life, their family offices and advisors. The focus is on raising awareness of positive possibilities in the relationship between trustee and beneficiary, and then assisting to discern practical steps.

He co-authored *TrustWorthy - New Angles on Trusts from Beneficiaries and Trustees*, a collection of 25 personal stories told by beneficiaries and trustees and *Family Trusts*.

Goldstone writes monthly for *Trusts and Estates - The Journal for Estate-Planning Professionals*. He has presented at conferences of the Family Office Exchange, Institute of Private Investors, American Bankers Association, Purposeful Planning Institute, and others.

Anna E. Nichols, MBA
Director of Communications, Altair Advisers

Anna Nicholas creates and leads the marketing and client education strategies for Altair Advisers, with more than a decade of experience in the family wealth industry.

Anna has authored multiple studies, articles and whitepapers and is a well-known writer and speaker on a wide range of generational wealth issues. She held management positions with a membership organization for ultra-high net worth families and their advisors, the New York City Bar Association, and the YWCA of New York City, and she consulted for the real property probate and trust section of the American Bar Association.

John A. Warnick J.D., M.B.A.
Founder, Purposeful Planning Institute

John Warnick is the founder of the Purposeful Planning Institute and Family Wealth Transitions & Solutions. As an industry leader, he delivers workshops across the nation for estate planning attorneys and financial planners sharing the Six Paradigms of Purposeful Planning and the Seven Keys of the Purposeful Trust. He also facilitates family retreats, and provides wealth counseling, fiduciary and philanthropic consulting services. He educates emerging adults in financial literacy, philanthropic service, and holistic family wealth principles. Warnick has authored two BNA (Bureau of National Affairs) Tax Management portfolios.

Vanderbilt Family Trusts: Beyond Technical Proficiency – Sample Program Schedule*

	Day 1	Day 2
AM	• Trust Basics • Defining Intent	• Assembling an Effective Team • Co-Trustees, Trust Protectors, and Trust Advisors • Selecting a Trustee
PM	• Becoming an Excellent Trustee • Becoming an Excellent Beneficiary • Preserving and Developing Human Capital	• Making Older Trusts More Flexible • Family Trust Governance

Classes typically run from 8:00 a.m. to 4:30 p.m. (Central). Breaks are scheduled in a.m., p.m. and for lunch. Schedule is subject to change.

**Program content and faculty subject to change; check website for details.*

Who Should Attend

We welcome the following:

- Family members who are in the role of grantor, trustee or beneficiary
- Professional trustees and family office executives serving as a trustee

This is private event and attendance is limited. All information shared during the event by attendees will be kept confidential.

Cost

$2,500

Cost includes tuition, instructional materials, and all scheduled meals listed above.

Visit **vanderbiltexecinstitute.com** to register. Click on "View Program Calendar" then click "Register Now" under Wealth Management Series: Family Trusts.

About the Vanderbilt Executive Development Institute

The Vanderbilt Executive Development Institute at the Owen Graduate School of Management offers proven and practical programs to help individuals and organizations refresh, engage, and strengthen management expertise. Open Enrollment Programs for individuals are short, highly focused programs in areas of Leadership, Management, and Strategy. Custom Programs for organizations are custom-built and are uniquely tailored to help each client tackle a specific organizational need or to achieve its developmental goals for established and emerging leaders.

Conveniently located near downtown Nashville, Vanderbilt Owen Graduate School of Management is ranked as a top institution by *BusinessWeek*, the *Wall Street Journal*, *U.S. News & World Report*, *Financial Times*, and *Forbes*.

Visit **vanderbiltexecinstitute.com** for more information regarding programs and schedules, faculty biographies, online registration, and maps and directions.

Scan this code to view upcoming programs and dates.

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