



Save The Date!

The 44th Annual Attorney / Trust Officer Liaison Conference

July 30 - August 1, 2026
The Breakers, Palm Beach

Registration for conference and hotel is
tentatively scheduled to open May 4, 2026

Arm Up the Trusted Advisor Team; Join Us for the Latest Trust and Estate Legal Updates and Perspectives

- **Discharge of the Trustee: Ins, Outs and Other Considerations**
Alexander S. Douglas II
- **Playing Offense and Defense: Strategies in Litigating Undue Influence, Elder Exploitation, and Tortious Interference Cases**
Daniel A. Seigel
Jorja M. Williams
- **Fiduciary Accounting: Aiding Fiduciaries & Beneficiaries**
Jolyon D. Acosta
- **Prenuptials: Love and Wealth (*some conditions may apply)**
Robert H. "Bo" Trudeau
- **Basis Planning Around OBBBA- Upstream Planning**
Edwin P. Morrow III
- **Unexpected Implications Of Trust Modification & Decanting**
Jeffrey M. Gad
- **Navigating Best Outcomes On Life Insurance**
Jamie L. Mendelsohn
- **Latest in Planning Strategies? Hot Topics and Best Planning Practices for Multi-Generational Families**
George D. Karibjanian
- **Technology & Financial Exploitation: Protecting the Elderly & Vulnerable**
Sasha F. Granai
- **Panel: Trust and Estate, Q&A**
Jeffrey A. Baskies, Michael A. Dribin, Robert W. Goldman
Sandra F. Diamond, Benetta Y. Park
- **Legislative Update**
S. Dresden Brunner
- **Case Law Update**
James R. George