

**School of Trust & Financial Services**  
**September 22-26, 2008 ~ Regency Lodge ~ Omaha, Nebraska**

<b>MONDAY</b> September 22	<b>TUESDAY</b> September 23	<b>WEDNESDAY</b> September 24	<b>THURSDAY</b> September 25	<b>FRIDAY</b> September 26
7:30- 8:00 a.m. <b>Registration</b>	7:00 - 8:00 a.m. <b>Breakfast</b>		7:00 - 8:00 a.m.	
8:00 - 8:45 a.m. <b>Orientation/Icebreaker</b>	8:00 - 10:00 a.m. <b>Investments</b>	8:00 - 10:00 a.m. <b>Retirement Planning</b>	8:00 - 10:00 a.m. <b>Trust Accounting &amp; Securities Processing</b>	8:00 - 9:00 a.m. <b>Final Exam</b>
8:45 - 10:00 a.m. <b>Overview of the Trust Industry</b>	10:00 - 10:15 a.m. <b>Break</b>		10:00 - 10:15 a.m.	9:00 - 9:15 a.m.
10:00 - 10:15 a.m. <b>Break</b>	10:15 - 11:15 p.m. <b>Investments</b> <i>(continued)</i>	10:15 a.m. - 12:15 p.m. <b>Compliance</b>	10:15 - 11:15 a.m. <b>Trust Accounting &amp; Securities Processing</b> <i>(continued)</i>	9:15 - 10:30 a.m. <b>Senior Market Relations</b>  10:30 - 10:45 a.m. <b>Closing Remarks &amp; Adjournment</b>
10:15 - 11:15 a.m. <b>Overview of the Trust Industry</b> <i>(continued)</i>	11:15 a.m. - 12:15 p.m. <b>Overview of Fiduciary Income Taxes</b>		11:15 a.m. - 12:15 p.m. <b>Estate Planning</b>	
11:15 a.m. - 12:30 p.m. <b>Veach - Johnson Case</b>				
12:30 - 1:15 p.m. <b>Lunch</b>		12:15 - 1:00 p.m.		
1:15 - 3:15 p.m. <b>Trust Administration</b>	1:00 - 3:00 p.m. <b>Overview of Fiduciary Income Taxes</b> <i>(continued)</i>	1:00 - 2:15 p.m. <b>Compliance</b> <i>(continued)</i>	1:00 - 3:00 p.m. <b>Estate Planning</b> <i>(continued)</i>	
3:15 - 3:30 p.m. <b>Break</b>		3:15 - 3:30 p.m.		
3:30 - 5:15 p.m. <b>Trust Administration</b> <i>(continued)</i>	3:15 - 5:15 p.m. <b>Developing Customer Relationships</b>	3:30 - 5:30 p.m. <b>Probate &amp; Conservatorships</b> <i>(continued)</i>	3:15 - 4:15 p.m. <b>Estate Planning</b> <i>(continued)</i>	
			4:15 - 5:00 p.m. <b>Exam Review</b>	
<b>Free Evening</b>	5:30 - 6:45 p.m. <b>Pizza Party</b>	<b>Free Evening</b>	<b>Self Study For Final Examination</b>	<i>(Note: Class schedule is subject to change)</i>