

The Maine Association of Community Banks presents



## 2010 TRUST AND WEALTH MANAGEMENT CONFERENCE

May 5, 2010 | Harraseeket Inn, Freeport

8:30 a.m.

### COFFEE WITH THE VENDORS

9:30 a.m.

Introductory Remarks  
Stuart Williams, Maine Bank & Trust Company  
MACB Trust & Wealth Management Working Group Chair

### INSIDE THE ECONOMY

Nariman Behravesh, Ph.D., chief economist--IHS

10:15 a.m.

Break

10:30 a.m.

### FIDUCIARY RISK MITIGATION/MANAGEMENT

Donald F. Moore, Jr., CEO--Bearmoor, LLC

11:30 a.m.

### THE OUTLOOK FOR 2010 AND BEYOND: IS THE ECONOMIC AND EQUITY MARKET RECOVERY SUSTAINABLE?

Philip J. Orlando, CFA, senior vice president, chief equity market strategist  
Federated Investors

12:30 p.m.

### LUNCHEON & EXHIBITS

Luncheon hosted by Federated Investors & Kyle Morgan

# Federated

WORLD-CLASS INVESTMENT MANAGER<sup>®</sup>

1:45 p.m.

### EMERGING TAX ISSUES FOR TRUST DEPARTMENTS: ACCOUNTANTS' PANEL

- "Roth IRA Conversions"  
Donna Ryan, tax principal—Baker Newman & Noyes
- "Succession Planning in Family-Owned Businesses"  
Frank O'Shea, principal—Berry Dunn McNeil & Parker
- "Bundled Fiduciary Fees and Other Timely Topics"  
Connie Bingham, tax partner—Macdonald Page & Company

2:45 p.m.

### THE PSYCHOLOGY OF SELLING

Greg Conderacci, Principal--Good Ground Consulting

3:45 p.m.

Concluding Remarks & Adjournment  
Stuart Williams