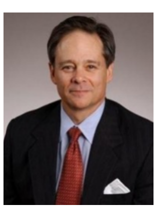
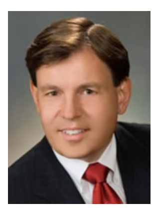
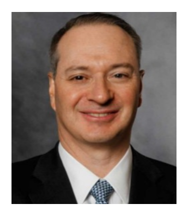
# NEVADA TRUST CONFERENCE

## March 1 & 2, 2022

## *Virtual Conference*



**INTERACTIVE VIRTUAL PRESENTATIONS**
**11:00 AM – 2:00 PM PACIFIC**

REGISTRATION: $159 PER PERSON
REGISTRATION FORM AT WWW.NVBANKERS.ORG/TRUST OR CALL 702-233-8607

**Nevada Bankers Association**

**TRUST COMMITTEE CHAIR**

**Brian J. Cook, CFP, CTFA.**, *President*
*Charles Schwab Trust Company*

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*Laurel Trust Company*

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**Ryan Moser, CPA/ Esq.**, *President*
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**Matthew Policastro, Esq.**, *Director-Trust Counsel*
*Charles Schwab Trust Company, Henderson, NV*

**Ann Rosevear, J.D.,** *President & Chief Trust Officer*
*Dunham Trust Company*

**PRESENTATIONS – Day One Order of Presentation**

**March 1, 2022 | 11:00 am – 2:00 pm Pacific**

11:00 am – Welcome

**THE BEST USE OF TRUSTS UNDER CURRENT TAX RULES**
**Jonathan G. Blattmachr, Esq.**, *Principal*
*Pioneer Wealth Partners*

**BUILDING TRUST SOLUTIONS TO WITHSTAND SCRUTINY**
**Michaelle D. Rafferty, Esq.**, *Shareholder*
*Maupin, Cox & LeGoy*

**UPDATE ON NEVADA TRUST LAW, WHAT'S NEW**
**Robert E. Armstrong, Esq.**, *Partner*
*McDonald Carano*

**NEVADA TRUST LAW UPDATES**
**Alan Freer, Esq.,** *Partner*
*Solomon Dwiggins Freer & Steadman, LTD*

**PANEL Q&A WITH NEVADA EXPERTS**
**Alan Freer, Esq.,** *Partner*, *Solomon Dwiggins Freer & Steadman, LTD*
**Bob Armstrong, Esq** *Partner, McDonald Carano*

2:00 pm – Day One Wrap up

Gold Sponsors

**PRESENTATIONS – Day Two Order Of Presentation**

**March 2, 2022 | 11:00 am – 2:00 pm Pacific**

11:00 am - Welcome

**THE ART OF TAX ISSUES AND OTHER CONCERNS FOR ART COLLECTORS**
**Paul N. Frimmer, Esq.**, *Partner*
*Loeb & Loeb LLP*

**TOPIC TBD**
**Robert Keebler,** *Parter*
*Keebler & Association*

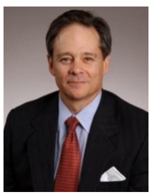
**NEVADA ROUNDTABLE – AN INTERACTIVE DISCUSSION WITH NEVADA PRACTIONERS**
Nevada's leading trust experts discuss hot topics and address audience questions

**FORMING A CRYPTO & DIGITAL TRUST COMPANY: REGULATORY CONSIDERATIONS FOR FORMING AND OPERATING A NEVADA TRUST COMPANY PROVIDING DIGITAL ASSET CUSTODY AND SERVICES**
**Matthew D. Saltzman, Esq.**, *Managing Shareholder*
*Saltzman Mugan Dushoff*

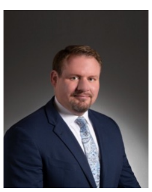
2:00 pm – Day Two and Event Wrap up

# SPEAKERS

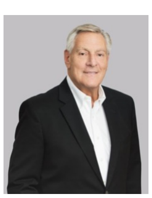
**Robert Armstrong, Partner**
**McDonald Carano law firm**
Robert Armstrong is a third-generation Nevadan with unmatched expertise advising high net worth clients and family trust companies on Nevada's trust, estate and tax planning legal and regulatory landscape. Bob has over forty years of experience serving clients as an attorney and a non-practicing CPA. He is a Fellow of the American College of Trust and Estate Counsel and a member of the American Institute of Certified Public Accountants among other affiliations. Bob has received six "Lawyer of the Year" awards from The Best Lawyers in America and is currently ranked for the 5th consecutive year in the highest Band 1 category for Private Wealth Law in Chambers USA High Net Worth Guide. He received his juris doctorate from Georgetown Law Center and a LL.M. in taxation from New York University.



**Jonathan Blattmachr, Principal**
**Pioneer Wealth Management**
Listed in The Best Lawyers in America, Jonathan G. Blattmachris a Principal in Pioneer Wealth Partners, in the estate planning advisory group. He gives lectures and has written extensively on estate and trust taxation and charitable giving. Mr. Blattmachris was a Harlan Fiske Scholar at the Columbia University School of Law, where he received his law degree and graduated cum laude. He has an A.B. from Bucknell University in mathematics. Mr. Blattmachris has written nine books and over 500 articles on estate planning and other tax issues. He has been an Advisor on The American Law Institute, Restatement of the Law, and Trusts 3rd; he is a member of the American Bar Foundation. He is a retired member of Milbank Tweed Hadley & McCloy LLP and of the Alaska, California and New York State bar associations.



**Alan Freer, Partner**
**Solomon Dwiggins and Freer Steadman**
Alan D. Freer is a member of the Las Vegas law firm of Solomon Dwiggins Freer & Steadman, LTD., where he focuses his practice primarily on trust and estate litigation. Mr. Freer also handles all aspects of trust and estate administration, and routinely represents beneficiaries and fiduciaries in contested matters. He has substantial experience in challenging and defending the validity of estate planning documents, including wills, codicils, trusts and amendments. Mr. Freer also routinely prosecutes and defends claims for breach of fiduciary duty, fraud, undue influence, breach of trust, accounting, fiduciary removal, competency, lack of capacity, unjust enrichment, closely held business disputes and elder abuse. Mr. Freer has received the highest "AV Preeminent Rating" by Martindale-Hubbell and has twice been recognized as the Lawyer of the Year for Southern Nevada in the area of "Trust and Estates" (2020) and "Trust and Estate Litigation" (2017) by Best Lawyers of America. Mr. Freer has also been recognized as one of the top 100 lawyers in the mountain states region by Super Lawyers. Mr. Freer is a member of the State Bar of Nevada and serves on the Standing Committee on Ethics and Professional Responsibility, previously completing a two-year term as committee chair. Additionally, Mr. Freer presently serves as a co-chair of the Legislative Committee for the Probate and Trust Section of the Nevada State Bar, a position he has held since 2014. Mr. Freer also volunteers as a mentor for the State Bar of Nevada's Transitioning into Practice program (2015-present), where he has assisted and trained newly licensed lawyers on Nevada-specific rules, procedures, ethics and best practices.

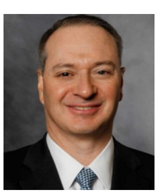


**Paul Frimmer, Partner**
**Loeb & Loeb, LLP**
Paul Frimmer focuses on estate planning, wills and trusts, probate and trust administration, postmortem tax planning, probate litigation, art law, charitable giving, and tax issues relating to these matters. Widely regarded as one of the top estate planning attorneys in the country, Paul has received numerous accolades for his work. He's known for taking a collaborative approach with his clients and guiding them toward the best decisions tailored to meet their individual needs. Paul has authored and co-authored more than 50 publications on estate planning and related matters. He is also a frequent speaker at national and local estate planning seminars and institutes, including the NYU Tax Institute, the USC Tax Institute, the University of Miami Estate Planning Institute, ALI-ABA seminars, the USC Probate and Trust Institute, and the UCLA Estate Planning Institute.

# SPEAKERS

**Robert S. Keebler, CPA/PFS, MST, AEP (Distinguished)**
**Partner, Keebler & Associates, LLP**
Robert S. Keebler is a 2007 recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. He has been named by CPA Magazine as one of the *Top 100 Most Influential Practitioners in the United States* and one of the *Top 40 Tax Advisors to Know During a Recession*. His practice includes family wealth transfer and preservation planning, charitable giving, retirement distribution planning, and estate administration. Mr. Keebler frequently represents clients before the National Office of the Internal Revenue Service (IRS) in the private letter ruling process and in estate, gift and income tax examinations and appeals, and he has received more than 250 favorable private letter rulings including several key rulings of "first impression." He is the author of over 100 articles and columns and is the editor, author or co-author of many books and treatises on wealth transfer and taxation. Mr. Keebler has been a speaker at national estate planning and tax seminars for over 25 years including the AICPA's: Estate Planning, High Income, Advanced Financial Planning Conferences, ABA Conferences, NAPEC Conferences, The Notre Dame Estate Planning Conference and the Heckerling Estate Planning Institute and is the immediate past the chair of the AICPA's Advanced Estate Planning Conference, serving in that capacity from 2014-2020.

**Michaelle D. Rafferty, Shareholder**
**Maupin, Cox & Legoy**
Michaelle DiGrazia Rafferty ("Michaelle") is a shareholder attorney in the law firm of Maupin, Cox & LeGoy, primarily practicing in the areas of estate planning, taxation, administration of trusts and estates, and family trust company planning and operations. Michaelle also practices in trust and estate related litigation, fiduciary litigation, and tax and audit related actions. Michaelle has been admitted as a Fellow of the American College of Trust & Estate Counsel (ACTEC) where she serves as the Nevada State Chair, and is a member of the Practice and Fiduciary Litigation Committees. Michaelle recently completed her position as Chair of the Nevada State Bar - Probate & Trust Section where she served as an executive officer for the previous 8 years. She continues to be an active member of the Section's Legislative and Amicus committees for Nevada, including drafting and testifying on pending legislation before the Nevada legislature, and appearing before the Nevada Supreme Court on matters of trust and estate litigation, including actions related to Nevada asset protection trusts. She serves as the Court-appointed member of the Nevada Supreme Court's Bench-Bar Committee representing interest of trust and estate counsel. Michaelle is a founding and current Executive Officer for the Probate Bar Association of Washoe County, and has previously served as Executive Officer of the Washoe County Bar Association. She is also a long-standing member of the Northern Nevada Estate Planning Council, and is a frequent speaker and presenter for both national and state continuing education courses related to her areas of practice. Michaelle represents diverse clientele including individuals, families, entities, private and commercial trust companies, university foundations, financial institutions, private and public foundations, family offices and private family trust companies. In her free time, Michaelle can be found skiing, hiking, running, biking, or kayaking in the Sierra Nevada mountains and lakes.



**Matt Saltzman, Partner**
**Saltzman Mugan Dushoff**
Matthew D. Saltzman is an attorney and Managing Shareholder of the Saltzman Mugan Dushoff law firm in Las Vegas, Nevada. Over the course of his twenty-five years as a business attorney in Las Vegas, Saltzman has developed a corporate law practice focused on financial institutions and administrative law which assists financial institutions and other highly regulated businesses with corporate and regulatory compliance matters. Saltzman and his team have worked to obtain licenses for a large number of Nevada retail and family trust companies. He has testified before the Nevada legislature as an expert on trust company legislation and drafted portions of Nevada law relating to the chartering and operation of Nevada trust companies. In recent years his practice has focused on counseling trust companies that providing services related to digital assets including cryptocurrency. Matthew Saltzman received a Bachelor of Arts degree in Economics and Philosophy from the University of Wisconsin, Madison, in 1987. In 1993, he received his Juris Doctor from the University of Pittsburgh School of Law. He was also Executive Editor of the University of Pittsburgh Law Review and served as a teaching assistant for the school's Legal Research and Writing course.

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Thoughtfully driven professional trustee streamlining complexity. Laurel Trust Company partners with your team of advisors to pursue your strategic objectives, ensuring our collective approach aligns with your goals. We offer simplified sophisticated solutions for a diverse yet intimate roster of clients.

SEILER LLP CERTIFIED PUBLIC ACCOUNTANTS

For 65 years, Seiler has provided advisory, tax, and accounting services to some of the world's most visionary and influential people, businesses, and non-profit organizations. Based in Silicon Valley and the San Francisco Bay Area, we are an independent member of HLB, the global advisory and accounting network. We deliver the sophisticated solutions, innovative thinking, global capabilities, and highly personalized service our clients require.

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**Alliance Trust Company** of Nevada works with professionals locally, nationally, and internationally to provide trustee services that benefit from Nevada's favorable asset protection and tax laws. Alliance is an independent trust company – not a subsidiary or affiliate of any brokerage house, insurance company, or bank. We offer flexible service including directed, delegated, and full fiduciary trustee services, as well as asset management. We Are Nevada.™. www.alliancetrustcompany.com

**Dunham Trust Company** provides the professional trustee services you need to prepare for a confident and secure legacy for generations. We offer highly personalized service, experienced trust officers, and an independent approach to properly implement and administer your trust. www.dunhamtrust.com

**Maupin, Cox & LeGoy** is one of Nevada's oldest and most respected law firms. We are a full service law firm that has developed a national reputation for excellence. Through its "Best Lawyers-Best Law Firms" initiative, U.S. News & World Report has consistently recognized Maupin, Cox & LeGoy as one of the top law firms in the State of Nevada. Maupin, Cox & LeGoy has the history, experience, and knowledge to provide the guidance and counsel you can rely on and trust. We are proud of our reputation and appreciate the continued opportunity to serve our clients, both within the great State of Nevada and beyond. www.mcllawfirm.com

**Peak Trust Company** serves estate planners looking for a professional trustee, who want reliable and accessible expertise to help them with their client's complex trust plans. Peak Trust Company provides a highly customized delivery process tailored to your specific needs and an unbundled service structure; providing everything you need but only what you want. Peak Trust Company serves as trustee of trusts nationwide, specializing in administration for trusts pursuant to Alaska or Nevada law. www.peaktrust.com

**Saltzman Mugan Dushoff** attorneys represent clients with business, licensing, and litigation matters in a variety of practice areas, including corporate law, liquor law, litigation and appellate law, bank and trust company law administrative law, employment law, health care law, securities law and creditors rights. Our Las Vegas business law firm is proud to represent local, national, and international business clients. www.nvbusinesslaw.com

**Seven Post Trust Company** is committed to offering highly-customized trust and other fiduciary services that efficiently meet the needs of our clients. Through our partnership with our employees, clients, and community, our mission is to make a positive impact for the people we support and to be a trusted resource for our clients to aid in carrying out their family legacy and further their financial goals. The principal objective of Seven Post Trust Company is to provide impartial, holistic fiduciary services tailored to the unique needs of each client it serves. www.sevenposttrust.com

**Solomon Dwiggins Freer & Steadman, LTD** knows estate litigation can tear families apart. These are sensitive issues that can test even the strongest family's bonds. It is essential that you take immediate action if you feel your interests may be at risk if litigation seems inevitable. Our attorneys provide aggressive representation to those facing disputes arising out of trust and estate matters in Nevada. Our team of highly experienced attorneys offers a wealth of courtroom experience and in-depth knowledge for our clients. www.sdfnvlaw.com

**Wealthgate Trust Company** is a client-founded multi-family Nevada trust company that exclusively partners with UHNW families and their advisors to create, implement, and administer bespoke trust strategies. Our founder – a practicing Trusts & Estates attorney and entrepreneur - created a trust company for families like his that desired a tailored, high-touch service executed by seasoned planning attorneys. Wealthgate is the unparalleled solution for clients that require innovative planning and optimal flexibility while eliminating the cost and burden of creating and maintaining a PTC. www.wealthgatetrust.com

## Silver Sponsors

**Accutech** fulfills its purpose to make great things happen for other people by delivering innovative trust and wealth management technology solutions and personalized service nationwide. Cheetah Wealth Management™ includes an innovative and comprehensive solution that leverages the latest technologies to drive growth through data transparency, operation efficiency and scalability. Integrated financial planning through Moneytree, a digital account opening product, Opendigital, and a digital community crowdfunding platform through Accutech's FiCrowd program are also available. www.trustasc.com

**McDonald Carano's** Nevada Trust & Estates Law Practice is ranked in the highest Tier 1 category in the "The Best Law Firms in America" 2022 report published by U.S. News–Best Lawyers, and 2021 is the fifth consecutive year that McDonald Carano is the only law firm in Nevada ranked in the highest Band 1 category in the prestigious Chambers High Net Worth Guide for Private Wealth Law. McDonald Carano attorneys Robert Armstrong and Scott Swain are also the only Band 1 ranked lawyers in Private Wealth Law in Nevada since 2017. www.mcdonaldcarano.com

## GENERAL INFORMATION:

**EVENT OVERVIEW:**
The Trust Company Committee of the Nevada Bankers Association invites you to attend the Nevada Trust Conference. Our inaugural online event features two 3-hour interactive days with nationally renowned speakers and expert discussions.

**WHO SHOULD ATTEND?**
The Conference attracts accountants; attorneys; family office executives; professional trustee executives; and wealth planners seeking expert discussions on technical, legislative, and planning developments.

**CONTINUE EDUCATION CREDIT**
**Earn up to 6 continuing education credits for public accounting, legal and wealth management certifications.**

Continuing legal education credit will be applied for in California, Nevada, and Utah. Materials detailing the presentations, including speaker biographies and presentation summaries, sufficient for self-reporting continuing education credit for CPAs will be provided. We are also seeking continuing education credit approval for CTFAs and CFPs. For past presentations by these presenters, continuing education credit has also been available for other credentials. If you are seeking continuing education credit for credentials other than those mentioned above, we urge you to reach out to the governing body of the applicable credential to determine if credit is available. We cannot guarantee that credit will be available in all cases or that the current year's field of study will be applicable to your area of specialty or valid continuing education for your credential.

**REGISTRATION INSTRUCTIONS**
**Complete the application on the last page of this brochure, or visit www.nvbankers.org/trust to download a pdf or a fillable word doc. Completed applications may be:**

**Emailed to nba@nvbankers.org**
**Faxed to 702-233-2546**
**Call 702-233-8607 to register via phone**

**CAN'T ATTEND?**
**If you are unable to attend the Conference but would like to receive a copy of the materials, please send your request to: Nevada Bankers Association**

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Virtual Event | 11:00 am – 2:00 pm Pacific

Event Sponsors:

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**Registrant Information**: please enter information as it should be listed on the roster, use this form for up to 2 delegates using the same payment method, use a separate form for additional delegates. Individual confirmation and event log in credentials will be sent to each individual via email.

**Complete, scan, fax or mail in this form, or call 702-233-8607 to register over the phone.**

1st **Delegate** First Name ________________________Last Name__________________________

Cell Phone____________________________ Email __________________________________

Company Title, Credentials* _____________________________________________________

Mailing Address including City, ST and Zip: ____________________________________________

2nd **Delegate** First Name ________________________Last Name__________________________

Cell Phone____________________________ Email __________________________________

Company Title, Credentials* _____________________________________________________

Mailing Address including City, ST and Zip: ____________________________________________

**Continuing Education**
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## Payment Information

Enter number of delegates from this form: _____

Enter number of additional delegates on separate forms: _____

-OR-

☐ This is an additional form

Total number of delegates _____ x $159* = Total Amount _____

(*EPCNN Members Discount Rate $129)

Cancelation Policy: The registration cost minus a $50 processing fee will be refunded in received no later than February 15th. After February 15th, registration fees are non-refundable. Registrations may be transferred, please notify NBA in a timely manner.

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1001 E Sunset Road #96513
Las Vegas, NV 89193

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