

# VIRGINIA BANKERS ASSOCIATION

VBA COMMITTEES

## Agenda

VBA Trust & Wealth Management Committee Meeting  
Friday, December 1, 2023  
10:30 a.m. to 12:30 p.m.  
4490 Cox Road, Glen Allen, Virginia 23060

### In Person Meeting – VBA Office

- I. Welcome – Jeff Hassler, Chairman
- II. Trust Hot Topics and 2024 Legislation
  - Discussion with Virginia Bar Association's Wills, Trusts & Estate Section Council Chair and Vice-Chair:
    - Dan Durst, Partner, Williams Mullen
    - Lauren Jenkins, Principal, Offit Kurman
  - Trustee release from liability for trust administration and termination of small trusts
  - Uniform Law Commission - Electronic Estate Planning Documents Act and electronic wills
- III. Roundtable Discussion
  - Use of alternative investments in fiduciary accounts
- IV. Lunch & Adjourn

### Zoom Link to Meeting:

<https://us02web.zoom.us/j/82971164699?pwd=d3dSbVRHTVh6cFdGem5pSE54eDdVQT09>

Meeting ID: 829 7116 4699

Passcode: 551834

### Tentative 2024 Meeting Dates

March 1<sup>st</sup>, May 10<sup>th</sup>, September 13<sup>th</sup>, November 15<sup>th</sup>

Trust & Wealth Management Committee Mission Statement

*To provide a venue for collaboration and sharing of ideas to foster a robust Trust and Wealth Management environment in the Commonwealth of Virginia so that Clients benefit by way of expanded competitive services and delivery options; Trust and Wealth Management Executives grow professionally through peer exchange and education; Banks benefit from developing ways to offer Trust and Wealth Management services as part of comprehensive relationships with clients; and the VBA promotes, represents and enhances the bank Trust and Wealth Management industry with the support of state legislative and regulatory officials.*