

VIRGINIA BANKERS ASSOCIATION

VBA COMMITTEES

Agenda

VBA Trust & Wealth Committee Meeting
Friday, June 10, 2022
10:30 a.m. to 12:00 p.m.

**In person! 4490 Cox Road
Glen Allen, VA 23060 (Zoom option)**

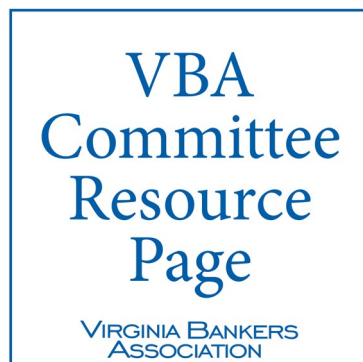
I. Welcome

- a. New member Abel Lewis, SVP & STO, Bank of America Private Bank

II. Roundtable Discussion

- a. Revisit complying with U.S. DOL PTE 2020-02 – IRA Rollovers
- <https://www.dol.gov/agencies/ebsa/about-ebsa/our-activities/resource-center/faqs/new-fiduciary-advice-exemption>
 - <https://www.wealthmanagement.com/regulation-compliance/what-pte-2020-02-means-advisors>
 - <https://www.groom.com/resources/dol-releases-faqs-on-pte-2020-02-foreshadows-future-activity-on-investment-advice/>
- b. Open forum

III. Adjourn & Lunch



Join Zoom Meeting

<https://us02web.zoom.us/j/83659749817?pwd=VmhqUIVvdmZqY1BTTm50SzBycGNldz09>

Meeting ID: 836 5974 9817

Passcode: 157339

One tap mobile

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+13017158592,,83659749817# US (Washington DC)

Upcoming Meeting Dates

September 9 (via Zoom), December 2nd (in person)

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.