VIRGINIA BANKERS ASSOCIATION
VBA COMMITTEES

Agenda

VBA Trust & Wealth Management Committee Meeting
Friday, March 25, 2022
10:30 a.m. to 12:00 p.m.

Via Zoom

I. **Welcome**
   a. Introductions by all members
   b. VBA Committees Handbook (Located on committee portal. Review on your own, we will not discuss)

II. **Roundtable Discussion**
   a. Trust technology platforms (See related PDF on committee portal)
      - What do you love about your system and what would you change?
   b. 401k services
      - Who provides them; why or why not; benefits and pitfalls; and which functions are performed in-house versus partner-provided?
   c. Revisit complying with U.S. DOL PTE 2020-02 – Fiduciary Advice Exemption
      - https://www.dol.gov/agencies/ebsa/about-ebsa/our-activities/resource-center/faqs/new-fiduciary-advice-exemption
   d. Obtaining EIN's for Trust and Estates

III. **Adjourn**

Join Zoom Meeting:

https://us02web.zoom.us/j/81599902655?pwd=RDQzakw1RXdRRzhDb1kvQ1ZqeHNpUT09
Meeting ID: 815 9990 2655
Passcode: 358918
One tap mobile
+13126266799,,81599902655# US (Chicago)
+16465588656,,81599902655# US (New York)
Dial by your location
+1 312 626 6799 US (Chicago)
+1 646 558 8656 US (New York)
+1 301 715 8592 US (Washington DC)

Upcoming Meeting Dates

June 10th (in person), September 9th (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.