

# VIRGINIA BANKERS ASSOCIATION

VBA COMMITTEES

## Agenda

VBA Trust & Wealth Management Committee Meeting  
Friday, November 21, 2025  
10:30 a.m. to 12:30 p.m. | 4490 Cox Road, Glen Allen, VA 23060

### 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.*

### VBA Antitrust Policy

*It is the policy of the Virginia Bankers Association to comply with all antitrust laws. In furtherance thereof, bankers should refrain from discussing the pricing of banking services or controlling banking markets.*

- I. **Welcome – Michael Williams, Chairman**
- II. **Traditional and Roth IRA Fees – Considerations and Best Practices**
- III. **IRS Delays – Estate Tax Clearance and Issuance of EINs**
- IV. **Open Roundtable**
- V. **Legislation Discussion with Virginia Bar Association's Wills, Trusts & Estates Section Council Chairman [Lauren Jenkins](#), Principal, Offit Kurman and Vice-Chairman [Alvi Aggarwal](#), Of Counsel, Yates Campbell LLP.**  
Lauren and Alvi will discuss: Silent Powers of Attorney, Self-Settled Spendthrift Trusts, Exempt Property (Deadline for Elections), and Show Cause Distribution Process.
- VI. **Adjourn & Lunch**

### Zoom Link to Meeting:

<https://us02web.zoom.us/j/85758181245?pwd=KbQrGdbUb570FLp9t9sXI0jY17SQZW.1>

Meeting ID: 857 5818 1245  
Passcode: 481467

### 2026 Meeting Dates TBD