

VIRGINIA BANKERS ASSOCIATION

VBA COMMITTEES

Agenda

VBA Trust & Wealth Management Committee Meeting
Friday, November 15, 2024
10:30 a.m. to 12:30 p.m. | 4490 Cox Road, Glen Allen, Virginia 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.

- I. **Welcome – Jeff Hassler, Chairman**
- II. **Trust Hot Topics and 2025 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
- III. **Roundtable Discussion**
- IV. **Lunch & Adjourn**

Zoom Link to Meeting:

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

Meeting ID: 829 7116 4699

Passcode: 551834

2025 Meeting Dates

TBD