



ATTENDANCE RECORD

2023 The Hunt, '23 Client Conference/Greenville, SC

November 14-17, 2023

Attendee Name: _____
 Company/Bank Name _____
 Address: _____
 City, State, Zip: _____
 Telephone: _____ Email: _____

Please circle the credits for the sessions attended. Input total credits at the bottom of the column (top of page 2) for your designation/certification.

Session	ATOP	CSOP	CTFA	CRSP	CCTS	CRCM	CISP
Growth, Stimulus, and Uncertainty	1.25(A)	1.25	1.25		1.25		
Crypto 101- An Introduction	1.25 (S)	1.25	1.25		1.25		
Clients are Changing, Are You?			1.25				
Obtaining Optimal Risk Adjusted Revenue			1.25				
Improved Decisions and Better Processes	1.25(S)						
The Art of Creating Emotionally Connected Clients			1.25				
Trends, Tailwinds, and Challenges	1.25(S)	1.25	1.25		1.25		
Monitoring Best Execution & Managing ETF Strategies for Asset Allocation Portfolios	1.25(S)	1.25	1.25		1.25		
Gain Efficiencies through Cheetah Imports	1.25(S)						
Top 10 Insights To Master The Human Side of Advice			1.25				
Hot Topics in Trust Regulation	1.25(A)		1.25			1.25	
Benefits of Insured Deposit Programs During a Banking Crisis			1.25				
How Agility Wins: Techniques from the Software World to Enhance your Business	1.25(S)						

Session	ATOP	CSOP	CTFA	CRSP	CCTS	CRCM	CISP
The Rise of Separately Managed Accounts and What is Attracting Investors			1.75				
Cheetah Client Panel	1.75(S)						
2023 Tax Update	1.25(T)		1.25	1.25			1.25
Topics in Trust & Wealth Management	1.25(A)		1.25				
Total Continuing Education Credits Available = Your Total:	<u>11.75</u>	<u>3.75</u>	<u>14</u>	<u>1.25</u>	<u>3.75</u>	<u>1.25</u>	<u>1.25</u>

Accredited Trust Operations Specialist (ATOP) possible individual credits for the 2023 The Hunt, '23 Client Conference are distributed as follows:

(S)Systems: 6.75, depending on which breakouts are attended

(T)Tax: 1.25, if tax session is attended

(A)Audit/Compliance/Regulatory: 3.75 depending on which breakouts are attended

The American Bankers Association approved the Accutech 2023 The Hunt, '23 Client Conference for the following continuing education credits:

CSOP: 3.75

CTFA: 14

CRSP: 1.25

CCTS: 3.75

CRCM: 1.25

CISP: 1.25

*To report credits and completion, must visit www.aba.csod.com. They do not accept credit submissions from training providers on behalf of members.

I hereby attest that I attended all sessions as indicated on this form: _____
Signature

Credits are based on a 50-minute hour.

Please retain a copy of this page for your records and submit the original to Accutech Systems for ATOP Credit ONLY or email directly to danielle.ritttenhouse@trustasc.com. CSOP, CTFA, CRSP, CCTS, CRCM, and CISP credits must be submitted directly to The ABA.



ACCUTECH UNIVERSITY