



HUNT

'25 CLIENT CONFERENCE

2025 The Hunt, '25 Client Conference/Tucson, AZ November 10-13, 2025

ATTENDANCE RECORD

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 | CTFA | CISP | CERP | CRCM | CFMP |
|---|---------------------------|------|------|------|------|------|
| Entrusted: Building a Legacy That Lasts | 1.25 | | | | | |
| Five Marketing Mistakes Trust Organizations Can't Afford to Make | | | | | | 1.25 |
| Adapt, Change or Disappear: New tools and a new mindset for a changing marketplace | 1.25 | | | | | |
| Managing the Will File- Maximizing Future Fee Business | 1.25(S) | 1.25 | | | | |
| Next-Level Investing: Unlocking Enhanced Functionality in Cheetah | 1.25 | | | | | |
| Name & Address Records: Not Just For Tax IDs and Addresses | 1.25(S) | 1.25 | | | | |
| Market Update | 1.25 | | | | | |
| Harnessing Artificial Intelligence Responsibly in Trust Organizations | 1.25(A) | 1.25 | | 1.25 | | |
| You need to be "comfortable being uncomfortable." | 1.25 | | | | | |
| Alternative Investments: An Overview and Portfolio Integration | 1.25 | | | | | |
| IRA Survival Guide - Manage your IRAs so they don't manage you | 1.25 (0.75 S / 0.75 T) | 1.25 | 1.25 | | | |
| Identifying, Attracting and Retaining Profitable Clients | 1.25 | | | | | |
| Beyond the Sweep: Rethinking Liquidity and Client Value in a Dynamic Rate Environment | 1.25 | | | | | |

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|---|----------|------|------|------|------|------|
| Exploring New Possibilities with Enhanced Features | 0.75(S) | 1.25 | | | | |
| The Hidden Power of Segmentation: Boost Efficiency, Drive Profitability | | 1.25 | | | | |
| Tapping the 40 Trillion in IRAs and 401ks | | 1.25 | 1.25 | | | |
| Workflow Wins: Streamline, Standardize, Succeed | 1.25(S) | 1.25 | | | | |
| Cybersecurity Panel, The Evolving Cybersecurity Landscape | 1.75(A) | | | 1.75 | | |
| Stepping up your Estate Settlement Process | | 1.75 | | | | |
| Cheetah Chats | 1.75(S) | | | | | |
| Tax Update | 1.25 (T) | 1.25 | 1.25 | | | |
| Current Regulatory Priorities for Trust Industry | 1.25(A) | 1.25 | | | 1.25 | |

| | ATOP | CTFA | CISP | CERP | CRCM | CFMP |
|---|--------------------|------------------|--------------------|-----------------|--------------------|--------------------|
| Total Continuing Education Credits Available = | <u>11.5</u> | <u>14</u> | <u>3.75</u> | <u>3</u> | <u>1.25</u> | <u>1.25</u> |
| Your Total: | _____ | _____ | _____ | _____ | _____ | _____ |

Accredited Trust Operations Specialist (ATOP) possible individual credits for the 2025 The Hunt, '25 Client Conference are distributed as follows:

(S)Systems: 6.25, depending on which breakouts are attended

(T)Tax: 2.0, depending on which breakouts are attended

(A)Audit/Compliance/Regulatory: 5 depending on which breakouts are attended

The American Bankers Association approved the Accutech 2025 The Hunt, '25 Client Conference for the following continuing education credits:

CTFA: 14 CISP: 3.75 CERP: 3 CRCM: 1.25 CFMP: 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. CTFA, CISP, CERP, CRCM, CFMP credits must be submitted directly to The ABA.