



HUNT

'24 CLIENT CONFERENCE

ATTENDANCE RECORD

**2024 The Hunt, '24 Client Conference/Nashville,
TN**

November 12-15, 2024

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
Economic Review		1.25
Customer Experience and the Role that Communications Play in Elevating it!		1.25
Driving efficiencies across business development and portfolio management	1.25(S)	1.25
Exception Based Processing - Closing the Loophole on Errors and Omissions	1.25(S)	1.25
RIA Market Trends		1.25
Navigating the New Normal in Engaging Consumer Investors		1.25
How to Prepare for Audits	1.25(A)	1.25
Digital Account Opening - Convenient, Efficient and Client Desired	1.25(S)	
Driving Efficiencies into a Growing Investment Business		1.25
Navigating the Operational Challenges of Unique Assets Held in Fiduciary Accounts	1.25(A)	1.25
Artificial Intelligence in Wealth Management		1.25

Session	ATOP	CTFA
Trustee Investing Traps		1.25
Creating an Executable Fee Strategy	1.25(S)	1.25
The New Moneytree -- Time for a Change		1.75
Cheetah Client Panel	1.75(S)	
2024 Tax Update	1.25(T)	1.25
Trust Regulation Hot Topics	1.25(A)	
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Total Continuing Education Credits Available =	<u>11.75</u>	<u>18</u>
Your Total:	_____	_____

Accredited Trust Operations Specialist (ATOP) possible individual credits for the 2024 The Hunt, '24 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 2024 The Hunt, '24 Client Conference for the following continuing education credits:

CTFA: 11.5

*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 credits must be submitted directly to The ABA.**



ACCUTECH UNIVERSITY