



CALL FOR SPEAKERS

INDEPENDENT TRUSTEE ALLIANCE ANNUAL CONFERENCE

MAY 15-17, 2024

DALLAS, TEXAS

Dear Speaker,

We are seeking in person presentations for our audience of Independent (Private) Professional Trustees, Attorneys, CPAs, Financial Advisors, Family Office Consultants and related professionals.

Talks must focus on the community and work of an Independent Trustee, the benefit of what you are teaching to the client/beneficiary or updates on the laws and technologies of your topic. Please refrain from “selling” your services or focusing solely on what your company has to offer.

All presentations will be submitted for CLE approval to various states so we ask the following as you prepare your outline for Board approval.

- Outlines must be substantive for Minimum Continuing Legal Education.
- Provide a short bio/introduction so we understand your expertise
- Include a summary of learning objectives: what will the audience now be able to do or understand after your presentation
- Include relevant law/statutes, handouts and other educational resources
- Presentations must be one hour (including Q&A)

Submit your outline to info@trusteealliance.com by December 15, 2023. If selected by the Board we will need your PowerPoint slide deck no later than January 31, 2024.