



2026 ANNUAL CONFERENCE

BECOMING A RISK-SMART TRUSTEE: REDUCING RISK AND RAISING STANDARDS



May 13–15, 2026 • Dallas, Texas

Dallas/Addison Marriott Quorum by the Galleria

14901 Dallas Parkway

Dallas, Texas 75254

Full Conference Attendance will be accredited
for 8.5 hours MCLE. Accreditation pending.

Pre-Conference Session Extra: Wednesday, May 13, 2026

>> Separate Registration Required

- 2:00–5:00 pm
“So, You Want to Be a Trustee?”
From Intake to Exit: Practical Pointers on Trusteeship for Professionals and Beginners

Panelists:

Marguerite Lorenz, Master Certified Independent Trustee, CLPF *Lorenz Private Trustees (CA)*

Dave Folz, Esq., *Trustee Consultant (TX)*

Tim Borchers, Master Certified Independent Trustee, CTFA *Estate Planning Law Specialist (MA)*

Conference Begins: Wednesday, May 13, 2026

- 6:00 pm – Opening Reception – everyone welcome

Thursday, May 14, 2026

- 7:30 am – Breakfast
- 8:00 am – Welcome – Kevin Quinn
- 8:15 am – Defusing Explosive Trusts – Dan Felix, Esq., and Amanda Koplin
- 9:15 am – Break
- 9:30 am – Changing Trusts, Changing Taxes: Risks to Watch – Nikki Laing, Esq.
- 10:30 am – Managing Unique Assets – Matt Erskine, Esq.
- 11:30 am – Lunch / ITA Annual Business Meeting and Update
- 12:30 pm – Trust-Owned Life Insurance: What Can Go Wrong – Ron Ware
- 1:30 pm – Release Agreements for Trustees – Brooke Ginsburg-Guerro, Esq.
- 2:15 pm – Reducing Beneficiary Risk Through Purpose-Inspired Trust Meetings
John A. Warnick, Esq.
- 3:15 pm – Break
- 3:30 pm – Investments and Risk Reduction – Wade Jewett and Matthew Bourque, Esq.
- 4:15 pm – Special Needs Trusts and Tools for Managing Distribution Risk with
Beneficiaries – Jim Wolverton, Esq.
- 5:00 pm – End of Presentations
- 5:15 pm – 6:30 ITA Happy Hour (at the Hotel)
- 6:30 pm – Dinner with Friends (Choose Your Own – Options Provided)

Friday, May 15, 2026

- 7:30 am – Breakfast
- 8:00 am – AI Practical Applications for Trustees – Dave Folz, Esq. & Frazer Rice, Esq.
- 9:30 am – Update on Cyber Liability and Trustee Insurance Trends – Judy Pearson
- 10:00 am – Break
- 10:15 am – Open Discussion
- 11:30 am – Wrap Up
- 12:00 pm – Adjourn