Approved to meet pre-certification education requirements to sit for the CTFA exam

Southern Trust School

2008 CATALOGUE

Sponsored by the Bankers Associations of Alabama, Georgia, Louisiana, Mississippi, and Tennessee

Education for Trust, Wealth Management and Private Banking Professionals

June 8-13, 2008

University of South Alabama Brookley Center

Mobile, Alabama

Southern Trust School Staff

CHAIRMAN OF THE BOARD – **RICK HARVEY**, REGIONS MORGAN KEEGAN TRUST, MOBILE, AL

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General Information

STANDARDS: In order to maintain the high standards of scholarship and social contact, enrolled students are expected to abide by the policies and guidelines set forth in the “Student Handbook”, and the Southern Trust School reserves the right to reject or terminate any enrollment.

ADMISSION REQUIREMENTS: Applicants must be employed by a bank, trust company, or financial institution that is a member of a state bankers association or employed by a federal or state regulatory agency. Class size is limited, and applications will be accepted on a first-come, first-served basis.

TUITION: The tuition for the 2008 Southern Trust School is $1,200 for state bankers association members and $1,500 for applicants from other eligible entities. **NOTE: Any applicant who is not admitted to the School or who withdraws prior to May 15 will receive a full refund of all tuition paid. Applicants withdrawing after May 15, but before June 1, will forfeit half of the tuition. Any and all cancellations or withdrawals after June 1, as well as no-shows, will result in full forfeiture of the paid tuition. Student substitutions (by the same firm/bank) must be approved and will result in an administrative fee charge of $50.00.**

Schedule of Events

DATE	TIME	ACTIVITY	SPONSOR
Saturday, June 7	3:00 – 9:00 p.m.	Early Arrivals	
Sunday, June 8	9:00 – 11:00 a.m.	Early Arrivals	
	11:00 a.m. – 1:00 p.m.	Registration	
	1:00 – 6:00 p.m.	Exhibitors	
	2:00 – 2:30 p.m.	Orientation	
	2:30 – 5:45 p.m.	Scheduled Classes	
	6:00 – 8:00 p.m.	Reception and Dinner	Broadridge Financial Solutions
Monday, June 9	8:15 a.m. – 7:00 p.m.	Scheduled Classes	
		Luncheon	Adams & Reese
Tuesday, June 10	8:15 a.m. – 4:45 p.m.	Scheduled Classes	
	6:30 p.m.	Reception and Social	Federated Investors
Wednesday, June 11	8:15 a.m. – 4:45 p.m.	Scheduled Classes	
	5:30 p.m.	Senior Class Dinner Cruise	Thomson Tax & Accounting
Thursday, June 12	8:15 a.m. – 4:45 p.m.	Scheduled Classes	
Friday, June 13	8:00 – 9:00 a.m.	Examinations Held	
	9:15 – 10:45 a.m.	Scheduled Class	
	11:00 a.m. – 12:00 Noon	Graduation	
	12:00 Noon	Session Concludes	

REFRESHMENT BREAK SPONSORS	WELCOME RECEPTION	PUBLICATIONS SPONSOR
Crews & Associates – Monday Feldman Securities – Tuesday	Goldman & Sachs	Proxytrust

Housing available for early arrivals, dinner on your own.
Breakfast and lunch are served daily in the cafeteria on campus (Monday through Friday).
Morning and afternoon refreshment breaks are provided in the area of the classes.

*** Attendance at classes and school-sponsored activities or events (to include orientation and graduation) is mandatory.**
**** It is advisable that all departing flights be booked after 2:00 p.m. on Friday, June 13.**

2008 Southern Trust School Course Listing

FIRST YEAR

***Effective Communications**	**1.5 hours**	Managing IRAs	2 hours
Employee Benefits I	2 hours	Meeting Client Objectives	2 hours
Ethics	1 hour	Principal & Income Laws	1 hour
Fiduciary Law	2 hours	Regulatory & Compliance Issues	2 hours
Fiduciary Tax I	2 hours	***Stress Management**	**1.5 hours**
Financial Planning I	2 hours	Trust Accounting	2 hours
Forestry/Timber Mgt	1 hour	Trust Administration I	2 hours
***Industry Outlook**	**2 hours**	Trust Business Development	1 hours
Intervivos Trust	3 hours	***Trust in Compliance**	**1.5 hours**
Joint Ownership	2 hours	Trust Investments	2 hours
Legal & Tax Research	1 hour	Types of Trusts	2 hours

SECOND YEAR

Charitable Trusts	2 hours	Portfolio Management I	2 hours
***Effective Communications**	**1.5 hours**	Real Estate Investments	2 hours
Environmental Liability	2 hours	***Stress Management**	**1.5 hours**
Estate Planning	4 hours	Traditional Bank Products	2 hours
Fiduciary Law II	2 hours	Trust Administration II	3 hours
Fiduciary Tax II	3 hours	***Trust in Compliance**	**1.5 hours**
Financial Planning II	2 hours	Trust Marketing	2 hours
***Industry Outlook**	**2 hours**	Trust Operations	2 hours
Life Insurance Trusts	2 hours	Wealth/Relationship Management	2 hours

THIRD YEAR

Alternative Investments	2 hours	Oil & Gas Interests	2 hours
Closely Held Business	2 hours	Open Architecture	2 hours
***Effective Communications**	**1.5 hours**	Portfolio Management II	2 hours
Elder Law/Specials Needs Trusts	2 hours	Post Mortem Planning	2 hours
Employee Benefits II	2 hours	Retirement Planning	2 hours
Estate Administration	2 hours	***Stress Management**	**1.5 hours**
Estate Planning	2 hours	***Trust in Compliance**	**1.5 hours**
Ethics Issues and Business Development & Investing	2 hours	Trust Liability & Discretionary Matters	4 hours
Generation Skipping Tax	2 hours	Will Analysis	2 hours
***Industry Outlook**	**2 hours**		

*** General sessions for ALL classes**

2008 Southern Trust School Faculty

JON ANDERSON, TRUSTMARK NATIONAL BANK, JACKSON, MS
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SOUTHERN TRUST SCHOOL
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Serving the Trust industry for more than 30 years . . .

A History of the Southern Trust School

The Southern Trust School was found in 1973 as an outgrowth of an eight-year program of workshops created and conducted by the Trust Division of the Alabama Bankers Association. Now sponsored by the bankers associations of Alabama, Georgia, Louisiana, Mississippi and Tennessee, the School offers a three-year program designed to meet the professional needs of those engaged in the trust or wealth management business. The School's ongoing mission is to meet the training needs of banks, trust companies, and examining agencies throughout the United States.

The purpose of the School is to provide an extensive educational program at a reasonable cost. The School is housed at the University of South Alabama Brookley Center in Mobile, Alabama. Students attending the school come from a variety of backgrounds, including trust professionals, wealth management bankers, bank examiners, accountants and attorneys. The school also attracts students who are experienced in a specialized phase of trust work who wish to broaden their knowledge and skills in the trust field as well as those seeking continuing education credits.

In January, 2006, the Southern Trust School received pre-certification education approval from the Institute of Certified Bankers and beginning with the graduating class of 2008, will certify graduates to sit for the CTFA examination. Past graduates and students graduating prior to 2008 may also be eligible but must contact the Institute of Certified Bankers directly concerning specific eligibility and registration to sit for the exam.

The first-year curriculum offers a broad overview of the trust profession. Second and third-year curriculums provide comprehensive focus on taxation, administration, fiduciary law, investments and management, utilizing a faculty of practicing professionals to lecture, discuss, and review specific case studies.

Approval for continuing education credits may be applied for with the State Bar Associations of Alabama, Georgia, Louisiana, Mississippi, and Tennessee, as well as the State Boards of Accountancy, Certified Financial Board of Standards, and the Institute of Certified Bankers (ICB). Graduates of the Southern Trust School are eligible to enter the ABA's National Graduate Trust School two-year program without attending the prerequisite National Trust School.