

**New York Bankers Association**  
**Essentials of Trust**  
**Administration**  
**June 9-12, 2020**  
**Doubletree Hotel – Tarrytown, NY**

A separate form must be completed by each applicant. Please make additional copies of this form if needed. **Please type or print all information.** Make a copy of this application for your files.

**APPLICANT:**

Full Name \_\_\_\_\_

Title \_\_\_\_\_

Nickname (for badge) \_\_\_\_\_

Telephone \_\_\_\_\_

Fax \_\_\_\_\_

E-mail \_\_\_\_\_

Bank/Firm \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Immediate Supervisor \_\_\_\_\_

Telephone \_\_\_\_\_

In case of emergency, contact:

\_\_\_\_\_

Telephone \_\_\_\_\_

**OFFICER APPROVING THIS APPLICATION:**

\_\_\_\_\_  
(Signed)

\_\_\_\_\_  
(Name – Please Type or Print)

\_\_\_\_\_

For Office Use Only:

Date Received \_\_\_\_\_

Payment \_\_\_\_\_

Check No. \_\_\_\_\_

Date Acknowledged \_\_\_\_\_

**REQUIREMENTS:**

Each student is required to attend all class sessions, participate in discussions, complete an online course and an in-class exam.

**FEE SCHEDULE:**

☐ \$2,075 per registrant for NYBA/PABankers/NJBankers\*

☐ \$2,275 per registrant for non-members

\* Members of other State Bankers Associations may register at the member rate.

The fee covers the cost of **single room** for three nights, meals, tuition, instructional materials and online course – Introduction to Trust Administration.

**CANCELLATIONS:**

Registrations cancelled prior to May 8 will be fully refunded. Registrations cancelled on or after May 8, 2020 are subject to a \$300 charge. Registrations cancelled on or after May 22, 2020 are subject to a \$750 charge. Registrations cancelled after June 1, 2020 will not be refunded. There is no charge for substitutions, but please call with their names. Requests for refunds must be made in writing and submitted to kmendelsohn@nyba.com.

**PAYMENT:**

Please make checks payable to the New York Bankers Association. To charge your registration to your VISA or MasterCard, complete the following (please type or print information, except for signature):

Check One: ☐ VISA ☐ MasterCard ☐ Check to follow

\_\_\_\_\_  
Name as it appears on card

\_\_\_\_\_  
Card Number

\_\_\_\_\_  
Expiration Date

\_\_\_\_\_  
V-Code

\_\_\_\_\_  
Signature

**PLEASE RETURN APPLICATION & PAYMENT TO:**

New York Bankers Association

99 Park Avenue, 4th Floor  
New York, NY 10016

Attn: Essentials of Trust Administration

Email: education@nyba.com

FAX: 212-297-1683

# ESSENTIALS OF TRUST ADMINISTRATION

## APPLICANT BACKGROUND INFORMATION

The information requested below is for administrative purposes only and will assist the Association in forming discussion groups and planning future programs. Your individual answers are confidential.

Name \_\_\_\_\_ Firm \_\_\_\_\_

Please check the appropriate boxes:

### **Educational Background (check the highest level achieved)**

- ☐ High School
- ☐ Some College
- ☐ Associate Degree
- ☐ Bachelor's Degree
- ☐ Master's Degree – Bus. Adm.
- ☐ Master's Degree – Other Major
- ☐ Law Degree
- ☐ Other Advanced Degree

### **Total Years Trust/Estate Experience**

- ☐ Less than 2 years
- ☐ 2 –4 years
- ☐ 5-7 years
- ☐ 8-10 years
- ☐ 11-15 years
- ☐ 16-19 years
- ☐ 20 and above

Other industry-specific programs attended (including year attended): \_\_\_\_\_

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Current work responsibilities: \_\_\_\_\_

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Prior trust, estate, or related experience includes: \_\_\_\_\_

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Approximately how much of your time do you spend in the following areas?

New Business	_____ %	
Administration	_____ %	
Investment	_____ %	
Tax	_____ %	
Other	_____ %	(specify): _____