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)____________________

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

For Office Use Only:
Date Received ________________________________
Payment ________________________________
Check No. ________________________________
Date Acknowledged __________________________
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):


Current work responsibilities:


Prior trust, estate, or related experience includes:


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

New Business ______%  Administration ______%
Investment ______%  Tax ______%
Other ______% (specify): __________________________________________