

53RD  
ANNUAL  
SESSION



# TRUST ADVISORS INSTITUTE

Continuing education and professional development  
for the financial services industry

FIDUCIARY FUNDAMENTALS, June 2 -8 2023

ADVANCED PRACTICES, June 8 -10, 2023

Leads to ATFA Certification

Meets the educational requirements of ABA Professional  
Certifications to sit for the CTFA Examination

ENRICH. EXPAND. GROW.

CAMPBELL UNIVERSITY | BUIES CREEK, NC | 27506

Dear Colleague:

We are proud to offer the Trust Advisors Institute (TAI) to the financial services industry. TAI is a wonderful educational opportunity for you or for your colleagues and employees in banking, credit unions, trust and investment companies, RIAs, supervisory agencies or elsewhere within the profession of being a well-versed fiduciary.

Campbell University has been the leading academic institution in the nation in the field of trust and wealth management for over 50 years. In addition to offering both undergraduate and graduate degrees in trust and wealth management, we made a strong commitment in 1969 to provide the highest quality continuing education programs to the industry. Literally thousands of trust bankers from all around the country have attended the Southeastern Trust School formerly offered by Campbell. They have carried that gained knowledge and expertise with them throughout their successful careers. Today, we offer a two-part program even better able to meet your specific needs and goals: Trust Advisors Institute—Fiduciary Fundamentals and Advanced Practices. Successful completion of the Advanced Practices program will also lead to the Accredited Trust and Financial Advisor (ATFA) certification held by over 1,000 fiduciaries nationwide and offered to the industry by Campbell University.



**TRUST ADVISORS INSTITUTE – FIDUCIARY FUNDAMENTALS** The Fiduciary Fundamentals program is designed to provide the participant the “big picture” with a very strong grounding in fiduciary law, taxation, financial planning, estate planning, investments, employees benefits, IRA’s, and sales.

**TRUST ADVISORS INSTITUTE – ADVANCED PRACTICES** The Advanced Practices program builds on expertise acquired in the Fiduciary Fundamentals Program focusing on advanced comprehensive case analysis; the latest in tax planning strategies; risk management, complex legal analysis, and advanced investment planning strategies.

**ACCREDITED TRUST AND FINANCIAL ADVISOR (ATFA) CERTIFICATION** Trust Advisors Institute leads to being awarded the ATFA certification by Campbell University. Students must complete BOTH the Fiduciary Fundamentals AND the Advanced Practices programs to be eligible to sit for the ATFA certification examination. Fiduciary Fundamentals and Advanced Practices are offered back-to-back requiring the applicant to only be away from the office for one week.

TAI takes place June 2 - 10, 2023 and is limited to 80 students. The program’s small classroom size allows students to participate fully and receive personalized attention while also net-working at social and recreational events.

This brochure explains the program in detail, but here are the key reasons to consider TAI and ATFA certification:

**INCREDIBLE VALUE.** The \$1,695 registration fee for Fiduciary Fundamentals and \$900 registration fee for Advanced Practices (\$2,495 if you register for both Fiduciary Fundamentals and Advanced Practices) includes classroom and workshop hours, lodging, meals and the the ATFA certification application and examination fees—making it an incredible value versus other professional development conferences and fiduciary certification programs.

**CONTINUING EDUCATION CREDITS.** Graduates of TAI Fiduciary Fundamentals are eligible to receive 28 hours of CFP credit. Graduates of TAI Advanced Practices are eligible to receive 20.25 hours of CTFA, 6.75 hours of CISP and 2.25 hours of CRSP credit.

**ATFA CERTIFICATION** demonstrates the very highest level of expertise, proficiency and skill as a fiduciary to your clients and within the profession.

Please review the brochure to learn more and to register for the program option that best suits your needs. We look forward to meeting you at Trust Advisors Institute this summer!

Sincerely,

A handwritten signature in black ink that reads "Jimmy Witherspoon". The signature is fluid and cursive, written over a horizontal line.

Jimmy Witherspoon  
Chairman  
Department of Trust and Wealth Management  
Campbell University  
910-893-1387  
witherspoon@campbell.edu



# INTRODUCTION

## THE TRUST ADVISORS INSTITUTE (TAI) TRADITION

FOR OVER FIVE DECADES, TRUST ADVISORS INSTITUTE (TAI) AND CAMPBELL UNIVERSITY HAVE HELPED THOUSANDS OF THE NATION'S TRUST AND WEALTH MANAGEMENT PROFESSIONALS TO ENRICH THEIR KNOWLEDGE, EXPAND THEIR CAREERS AND GROW THEIR INSTITUTIONS.

TAI is an exceptional educational opportunity—whether you're a seasoned veteran looking to “brush up” on current practices and policies, or a newcomer seeking a comprehensive overview of the issues in your field.

As its name suggests, TAI originated as a program for bank trust officers, and it retains a strong focus on the fiduciary side of the trust and wealth management industry. It also offers value to managers and other employees of investment firms, trust companies, credit unions, RIA's, accounting and law firms, retirement plan providers, supervisory agencies and non-profit administrators.

TAI is sponsored by Campbell University, the national leader in trust and wealth management education. To find out more about Campbell's Trust and Wealth Management degree programs and supporting the Trust Education Foundation Inc., please visit [www.trusteducationfoundation.com](http://www.trusteducationfoundation.com). Here are the reasons why TAI is special:

## CUSTOM DESIGNED AND PERSONALIZED TO MEET YOUR NEEDS AND CAREER GOALS...



Applicants MAY chose to enroll in the **FIDUCIARY FUNDAMENTALS PROGRAM ONLY**. Fiduciary Fundamentals is well suited to provide the student the “big picture” at a very high level as to law, tax, estate planning, financial planning, investments, trust and estate administration, regulatory and compliance, employee benefits, and sales. Fiduciary Fundamentals is the equivalent of Southeastern Trust School formerly offered by Campbell University.



Qualified applicants interested in more advanced training MAY chose to enroll in the **ADVANCED PRACTICES PROGRAM ONLY**. Graduates of the Fiduciary Fundamentals (formerly Southeastern Trust School); or an equivalent foundational trust education program are eligible to enroll in the Advanced Practices program bypassing Fiduciary Fundamentals. The ATFA certification examination will be offered the last day of the Advanced Practices program.



Interested applicants MAY and are also ENCOURAGED to enroll in **BOTH THE FIDUCIARY FUNDAMENTALS AND ADVANCED PRACTICES PROGRAMS**. Fiduciary Fundamentals and Advanced Practices are offered “back to back”. Upon successfully completing the Fiduciary Fundamentals examination, students advance into the Advanced Practices program and sessions. The ATFA certification examination will be offered the last day of the Advanced Practices program.

Graduates of BOTH TAI Fiduciary Fundamentals and Advanced Practices also meet the educational requirements of ABA Professional Certifications to sit for the CTFA Examination. They are also eligible to register for ABA Wealth and Trust School-Advanced

## GENERAL INFORMATION

APPLICATIONS MUST BE RECEIVED BY MAY 15.

You may register and pay online at <https://business.campbell.edu/trust-advisors-institute/>

### ELIGIBILITY

TAI is open to professionals from a variety of institutions, including but not limited to banks, trust and investment companies, credit unions, supervisory agencies, accounting firms, law firms, financial planning companies, RIA's, retirement plan providers, benefits administrators and non-profit administrators.

### APPLICATION

Because TAI is limited to 80 students, early application is encouraged. Each candidate must complete an application form (see pp. 7-8; or apply online at <https://business.campbell.edu/trust-advisors-institute/>

To be considered, each applicant must have his/her manager sign the form. Admissions decisions are made by The TAI / ATFA Certification Advisory Committee. Applications must be received by May 15.

### COST

The total cost for Trust Advisors Institute – Fiduciary Fundamentals is \$1,695, which includes tuition, room and board and classroom materials. The total cost for Trust Advisors Institute – Advanced Practices which includes tuition, room and board, classroom materials and the ATFA examination is \$900. The total cost for both programs is \$2,495.

You may register and pay online online at <https://business.campbell.edu/trust-advisors-institute>

### CANCELLATION POLICY

Cancellations received after May 15 will be refunded the application fee minus \$100 to cover the cost of materials and handling.

## PLEASANT & COMFORTABLE SETTING

### LOCATION

Trust Advisors Institute is held on the Campbell University campus in Buies Creek, North Carolina, 30 miles south of Raleigh. Campbell offers a quiet and pleasant atmosphere for both study and recreation. The Campbell campus is located on Highway 421, four miles east of the intersection with Highway 401. If traveling by air, fly into Raleigh/Durham International Airport (RDU), which is located approximately 45 miles from campus. A limited number of pickups from the airport are available through TAI; contact Jimmy Witherspoon by May 20 at 910-893-1387 or [wITHERSPOON@campbell.edu](mailto:wITHERSPOON@campbell.edu)



### ACCOMMODATIONS

TAI students will stay in Luby Wood Hall, constructed in 2017. All students will be assigned to a private room with a private bathroom.



TAI STUDENTS STAY IN LUBY WOOD HALL ON CAMPUS (SHOWN ABOVE AND BELOW LEFT).

### MEALS

All meal costs are covered in the program fee. Group dinners off campus are scheduled on June 3 and June 7. All other meals are served in a private dining room in Campbell's newly opened Student Union.

### CLASS SESSIONS

All classes will be held in state-of-the-art classrooms in the Lundy-Fetterman School of Business. Students will also have access to the First Citizens Bank Wealth Management Center while on campus.

### ATTIRE

Casual attire is appropriate for TAI.

### RECREATION

Facilities for golf, tennis, softball, swimming, fishing and jogging are available. Students should bring their own sports equipment and clothing.

## VALUABLE CAREER CREDENTIALS

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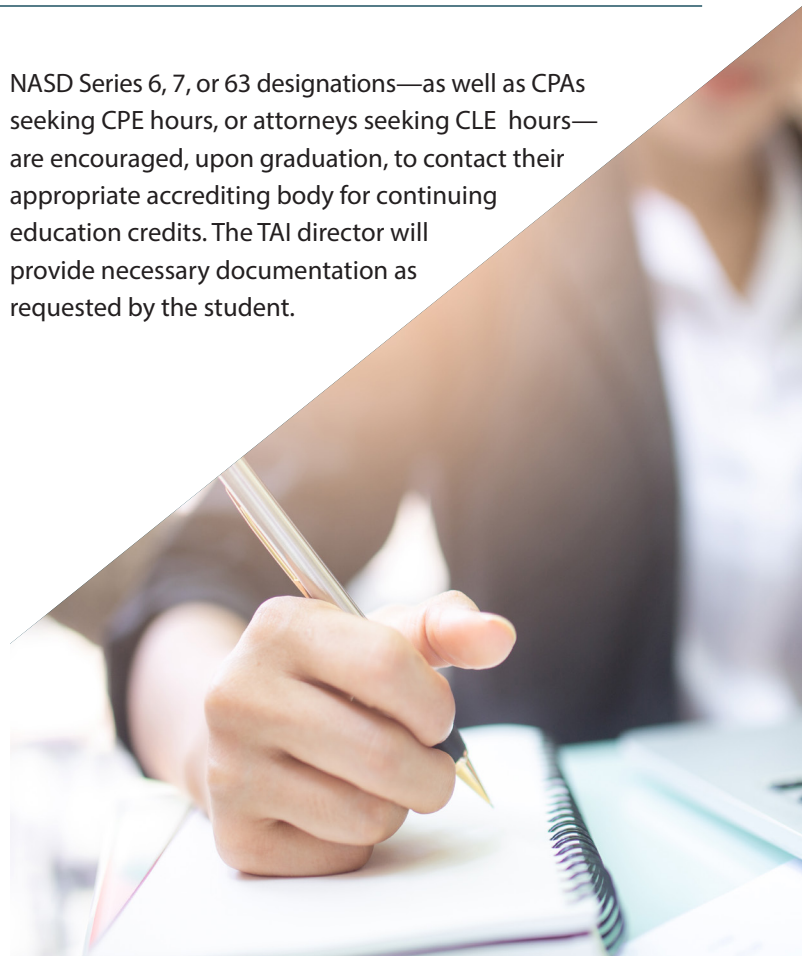
### ACCREDITATION

Each student who completes the Trust Advisors Institute – Fiduciary Fundamentals requirements receives a certificate issued jointly by TAI and Campbell University. Each student who completes the Trust Advisors Institute – Advanced Practices requirements will be granted the ATFA Certification by TAI and by Campbell University. There are ongoing annual renewal fees and CE requirements to maintain the certification. Those same students will also meet the educational requirements of ABA Professional Certifications to sit for the CTFA Examination.

### CONTINUING EDUCATION CREDITS

Graduates of Trust Advisors Institute – Fiduciary Fundamentals holding the CFP certification will receive 28 hours of continuing education credit. Graduates of Trust Advisor Institute-Advanced Practices are also eligible to receive 20.25 hours of CTFA, 6.75 hours of CISP, and 2.25 hours of CRSP continuing education credit. Attorneys, licensed insurance professionals and CPAs graduating from TAI may be eligible for continuing education credits depending on the requirements in their jurisdiction. Students holding the CFIRS; CFSA or

NASD Series 6, 7, or 63 designations—as well as CPAs seeking CPE hours, or attorneys seeking CLE hours—are encouraged, upon graduation, to contact their appropriate accrediting body for continuing education credits. The TAI director will provide necessary documentation as requested by the student.



# GENERAL INFORMATION



## BASIC PROGRAM REQUIREMENTS

### ATTENDANCE

Attendance at all Trust Advisors Institute classes and workshops (including commencement) is required. Students who miss these sessions without a prior excuse will not receive a certificate or continuing education credits.

### HOMEWORK

No homework is assigned; all work is completed in classes or workshops. Students will need, however, to study on their own time for the final exam offered at the conclusion of the Fiduciary Fundamentals program and the ATFA certification examination offered at the conclusion of the Advanced Practices program.

### FIDUCIARY FUNDAMENTALS CERTIFICATE

Students who successfully completed Fiduciary Fundamentals will receive a certificate. The certificate acknowledges that they are a graduate of the program and are eligible to submit TAI Fiduciary Fundamentals for CE credit.

### ATFA EXAM

On the morning of the last day of the Advanced Practices program, each student must complete a written examination on the topics covered in TAI. Exam results will be provided electronically the next week. Students who successfully complete the exam receive the ATFA certification. It should be noted there are ongoing CE requirements and an annual renewal fee required to maintain the certification.

## PROUD SPONSORSHIP

### CAMPBELL UNIVERSITY

Campbell University offers the nation's only undergraduate degree program in trust and wealth management. Institutions such as Bank of America, Wells Fargo, JP Morgan, Truist Bank and Trust, City National, Merrill Lynch Trust, and First Citizens Bank actively recruit Campbell trust program students for permanent positions and summer internships. Campbell is the third-largest private university in North Carolina, located in the heart of the state's booming research triangle area. Visit [www.campbell.edu](http://www.campbell.edu) to learn more.

### THE TRUST EDUCATION FOUNDATION

The Trust Education Foundation, Inc., was established to ensure that Campbell's trust and wealth management academic programs keep pace with the changing needs of trust institutions and the financial services industry. The Foundation sponsors continuing education programs such as the Trust Advisors Forum to assist students and professionals in these fields. Financial institutions nationwide contribute to the foundation, reviewing curricula, establishing scholarships and sponsoring executive education sessions. The Foundation's board of directors includes 40 representatives from leading firms.



Visit [www.trusteducationfoundation.com](http://www.trusteducationfoundation.com) to learn more.

THE TRUST EDUCATION FOUNDATION, INC., WAS ESTABLISHED TO ENSURE THAT CAMPBELL'S TRUST AND WEALTH MANAGEMENT ACADEMIC PROGRAMS KEEP PACE WITH THE CHANGING NEEDS OF TRUST INSTITUTIONS AND THE FINANCIAL SERVICE INDUSTRY.





# FIDUCIARY FUNDAMENTALS CURRICULUM & PROGRAM SCHEDULE

IN JUST ONE WEEK, TAI STUDENTS GAIN UP-TO-DATE INFORMATION ON—AND AN IN-DEPTH UNDERSTANDING OF— MANY FINANCIAL AND LEGAL TOPICS

## PERTINENT TOPICS

Fiduciary Fundamentals covers 11 topics of interest to professionals throughout the financial services industry. In just one week, TAI students gain up-to-date information on—and an in-depth understanding of—many financial and legal topics. The program balances classroom time with study, discussion and recreational opportunities, as well as social events for students and faculty.

### COMPLIANCE

Discussion of the audit function, formal examinations including the trust rating system and the compliance function.

### ESTATE PLANNING

Integrated analysis of the estate planning process covering probate avoidance, property ownership, wills, trusts, powers of appointment, estate tax, charitable transfers and more.

### ETHICS

The unauthorized practice of law, confidentiality, breach of trust, self-dealing issues relating to unfair trading of securities, conflict of interest and the prudent person standard are addressed as core components in all TAI sessions. Topic also can be covered in a separate class.

### FIDUCIARY LAW

Analysis of fiduciary principles and the substantive law of trusts. Analysis includes fiduciary powers, duties and liability as well as regulatory provisions affecting the fiduciary business.

### FINANCIAL PLANNING

In-depth analysis of the financial planning process, from data gathering through analysis, implementation and monitoring.

### INVESTMENTS

Overview of the investment process for equities, fixed income and real estate. Discussion includes technical analysis, security trading and key investment concepts (asset allocation, diversification, risk and return).

### EMPLOYEE BENEFITS / IRAs

Discussion of Employee Benefits Accounts and Individual Retirement Accounts and their role in financial and estate planning, including required distributions during the lifetime and after death. Additionally, we will cover beneficiary options and QTIP opportunities as well as use by future generations.

### SELLING/RELATIONSHIP MANAGEMENT

Overview of trust services and the elements of a successful client relationship and sales effort. Discussion of sales calls as well as the competitive environment.

### TAXATION

Study of taxation issues in a fiduciary context: income tax, estate tax, gift tax, generation skipping tax and special valuation rules. Case study integrates the various concepts.

### TRUST AND ESTATE ADMINISTRATION

Review of the characteristics of trust business. Discussion includes estate administration, the various types of trusts and agency accounts, guardianship and powers of attorney issues.

### REGULATORY AND COMPLIANCE SCOPE AND METHODS

This course will discuss the regulatory and compliance process and how they should work side by side with your trust department and staff auditor.

## FIDUCIARY FUNDAMENTALS FULL SCHEDULE

	FRIDAY JUNE 2	SATURDAY JUNE 3	SUNDAY JUNE 4	MONDAY JUNE 5	TUESDAY JUNE 6	WEDNESDAY JUNE 7	THURSDAY JUNE 8
MORNING		Fiduciary Law	Fiduciary Law  Taxation	Financial Planning  Estate Planning	Investments	Regulatory and Compliance  Employee Benefits and IRAs	ADVANCED PRACTICES Begins
AFTERNOON	Registration and Check-in	Lunch  Taxation	Lunch  Taxation Workshop  Financial Planning	Lunch  Estate Planning  Estate Planning	Lunch  Trust Administration	Lunch  IRAs  Selling/Relationship Management	
EVENING	Reception  Dinner  Orientation	Recreation and Study Period  Dinner Off Campus  Durham Bulls Game	Recreation and Study Period  Dinner  Financial Planning	Recreation and Study Period  Dinner  Investments	Recreation and Study Period  Dinner  Trust Administration	Recreation and Study Period  Dinner Off Campus Pinehurst Country Club	



# ADVANCED PRACTICES CURRICULUM & PROGRAM SCHEDULE

THE ADVANCED PRACTICES PROGRAM BUILDS ON EXPERTISE ACQUIRED IN THE FIDUCIARY FUNDAMENTALS PROGRAM

## PERTINENT TOPICS

Advanced Practices covers 8 complex topics of interest to seasoned professionals throughout the financial services industry.

**ESTATE, GIFT AND GENERATION SKIPPING TAX PLANNING STRATEGIES**  
Negative estate, gift, and generation skipping tax consequences can be disastrous for your client. The class delves deeper into tax saving options for your clients.

**FIDUCIARY INCOME TAXATION PLANNING STRATEGIES**  
With less than 1% of the population needing an estate tax return, the opportunities for tax savings in fiduciary income tax become even more important. Learn, in depth, the options you have to save your client fiduciary income tax dollars.

**COMPREHENSIVE TAX PLANNING CASE STUDIES**  
This session involves a myriad of options regarding gifts for a variety of different situations for both individuals and charities. Generation skipping, transfers to irrevocable trusts, and marital trust options are discussed. Also discussed are the use of disclaimers and what to do taxwise with a closely held business.

**ADVANCED FIDUCIARY LAW TOPICS AND TRENDS**  
Discussed will be a variety of ethical issues that can create liability and of Uniform Acts that affect us all, such as the Uniform Trust Code, Uniform Probate Code, and Uniform Principal and Income Act.

**RISK MANAGEMENT APPLICATIONS**  
A comprehensive analysis of the risk management process and its impact on the individual, business, and the economy in the 21st century. Case studies on current trends in risk management will be presented in class.

**COMPREHENSIVE INVESTMENT PLANNING CASE STUDIES**  
Stocks, bonds, mutual funds, and cutting edge, unique investment vehicles are discussed. Additionally, the responsibilities of portfolio management are covered.

**COMPREHENSIVE FINANCIAL PLANNING CASE STUDIES**  
Putting what you have learned into action, with a variety of real-life financial planning scenarios. This class will be done in a group setting.

**COMPREHENSIVE ESTATE PLANNING CASE STUDIES**  
Putting what you have learned into action, with a variety of real-life fiduciary situations. This class will be done in a group setting.

## ADVANCED PRACTICES FULL SCHEDULE

	THURSDAY JUNE 8	FRIDAY JUNE 9	SATURDAY JUNE 10
MORNING	Estate, Gift, and GST Planning Strategies  Fiduciary Income Tax Planning Strategies	Risk Management Applications Scope and Methods  Comprehensive Investment Planning Case Studies	ATFA Exam
AFTERNOON	Lunch  Comprehensive Tax Planning Case Studies  Advanced Fiduciary Law Topics and Trends	Lunch  Comprehensive Financial Planning Case Studies  Comprehensive Estate Planning Case Studies	
EVENING	Recreation and Study Period  Dinner  Advanced Fiduciary Law Topics and Trends	ATFA Review  Dinner  Study Period	



The Advanced Practices program builds on expertise acquired in the Fiduciary Fundamentals Program focusing on advanced comprehensive case analysis, the latest in tax planning strategies, risk management, complex legal analysis, and advanced investment planning strategies.

# Why should you acquire ATFA Certification?



**ATFA**  
ACCREDITED TRUST  
FINANCIAL ADVISOR

**CAMPBELL UNIVERSITY** is proud to offer the ATFA Certification to the financial services industry and to fiduciaries nationwide. Over 1,000 trust professionals have acquired the ATFA Certification over the last decade and it is quickly becoming a new “Gold Standard” for true fiduciaries.

The ATFA Certification is available to ALL fiduciaries whether they are serving their clients with banks, credit unions, independent trust companies, broker affiliated trust companies, wealth advisory firms or law firms offering trust services. In an increasingly complex, litigious and regulatory environment, never has the need been greater for trust professionals well versed in, and with a demonstrated mastery of, the very highest level of fiduciary expertise. A trust professional holding the ATFA Certification will, in every sense have demonstrated that they are ready to face those challenges.



## CAREER ADVANCEMENT

Set yourself apart with a gold standard of professional expertise in the trust industry. Learn more about the value of the ATFA certification to you and your institution.



## CONTINUING EDUCATION DEVELOPMENT

The ongoing CE requirements of the ATFA certification program can easily be maintained by attending the Trust Advisors Forum at Pinehurst. The Forum is offered by the Trust Education Foundation, Inc. and is the nation's premier trust conference. Information about the Forum can be found at [www.trusteducationfoundation.com](http://www.trusteducationfoundation.com)



## A CERTIFICATION PROGRAM SPECIFICALLY GEARED TO MEET THE NEEDS OF TODAY'S FIDUCIARIES

The primary focus of the ATFA certification is proudly and unwaveringly on the fiduciary side of the business...with all of its challenges and opportunities.



## AFFORDABLE INVESTMENT IN YOUR FUTURE AND THE FUTURE OF THE INDUSTRY

The intentionally modest fees are not only affordable, but you will also be making an important investment in the future of the industry. The fees associated with ATFA and Trust Advisors Institute will flow into trust scholarships for the students majoring in trust and wealth management at Campbell.

# TRUST ADVISORS INSTITUTE APPLICATION FORM

SPONSORED BY CAMPBELL UNIVERSITY

YOU MAY ALSO REGISTER ONLINE AT [HTTPS://BUSINESS.CAMPBELL.EDU/TRUST-ADVISORS-INSTITUTE](https://business.campbell.edu/trust-advisors-institute)

Ms.    Mrs.    Mr.

Name \_\_\_\_\_  
Last First Middle

Name by which you wish to be called \_\_\_\_\_

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

Officer    Non-Officer   Company Name \_\_\_\_\_

Business Mailing Address \_\_\_\_\_

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

Title or Position \_\_\_\_\_

Business Phone \_\_\_\_\_

Type of Business (check one)    Trust Department    Credit Union    Non Profit    Investment Advisor    RIA

Law, Accounting or Tax Firm    Employee Benefit Company

CFP   ID Number \_\_\_\_\_    Other   ID Number \_\_\_\_\_

Certifications/Designations/Licenses

\_\_\_\_\_  
\_\_\_\_\_

List any financial services courses completed:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# TRUST ADVISORS INSTITUTE APPLICATION FORM

SPONSORED BY CAMPBELL UNIVERSITY

In applying for this school, I understand that I will be expected to live in assigned quarters, to attend all scheduled classroom and work periods during the session, to prepare all assigned work and otherwise to abide by the established standards of the school. To cover the total cost of room, board and tuition, I have:

- Enclosed is my check for \$1,695 for  
Trust Advisors Institute - **FIDUCIARY FUNDAMENTALS only**, payable to Trust Advisors Institute
- Enclosed is my check for \$900 for  
Trust Advisors Institute - **ADVANCED PRACTICES only**, payable to Trust Advisors Institute
- Enclosed is my check for \$2,495 for BOTH PROGRAMS  
Trust Advisors Institute - **FIDUCIARY FUNDAMENTALS AND ADVANCED PRACTICES**, payable to Trust Advisors Institute

RECOMMENDED BY:

\_\_\_\_\_  
(Manager or Name of other authorized signature)

Title \_\_\_\_\_

## IMPORTANT:

This application and accompanying check (payable to Trust Advisors Institute) should be mailed  
**no later than May 15, 2023**, to:

Trust Advisors Institute  
Campbell University  
P.O. Box 218  
Buies Creek, NC 27506

Notice of cancellation must be received prior to May 15, 2023. Cancellations received after May 15 will be refunded the registration fee minus \$100 to cover the cost of materials and handling.

YOU MAY ALSO REGISTER ONLINE AT [HTTPS://BUSINESS.CAMPBELL.EDU/TRUST-ADVISORS-INSTITUTE](https://business.campbell.edu/trust-advisors-institute)

## TALENTED TAI FACULTY

Our faculty are accomplished professionals with long tenures in their fields. They also are dedicated teachers with strong ties to Campbell University's trust and wealth management programs.

TAI INSTRUCTORS INCLUDE BANK EXECUTIVES, ATTORNEYS AND CPAS, AS WELL AS OTHER SPECIALISTS IN FINANCIAL AND LEGAL DISCIPLINES.

The TAI faculty develops the curriculum and leads all classroom/workshop sessions. They also attend meals and other social events with TAI students, who can benefit greatly from these mentoring and networking opportunities.

Tyler Britton  
Professor  
Campbell University  
Buies Creek, North Carolina

David D. Butler  
Professor  
Campbell University  
Buies Creek, North Carolina

Eliner J. Foy  
Partner  
Wyrick Robbins  
Raleigh, North Carolina

Sherwood C. "Chris"  
Henderson, CPC  
Attorney  
White and Allen  
Kinston, North Carolina

Steve Leidheiser  
Senior Vice President  
First Citizens Bank  
Raleigh, North Carolina

Ryan A. Newkirk  
Principal  
Managing Director  
Granville Capital Inc.  
Greensboro, North Carolina

Richard H. Newton  
President  
Newton and Associates  
Raleigh, North Carolina

Kristy Meares Sides  
Partner  
Worrell Sides, LLP  
Raleigh, North Carolina

Phillip Strickland  
Senior Vice President &  
Senior Director of Institutional  
Trust  
First Citizens Bank  
Raleigh, North Carolina

Kenneth Swayze, Jr.  
Senior Vice President  
(Retired)  
First Citizens Bank  
& Trust Co.  
Hendersonville,  
North Carolina

Brandon Whitley  
Senior Vice President  
First Citizens Bank  
Raleigh, North Carolina

Kristin Rice  
Director and General Counsel  
Division of Legal Affairs  
NC Office of the  
Commissioner of Banks  
Raleigh, North Carolina

## PROGRAM CONTACT

Questions about the program can be directed to:

Mr. Jimmy Witherspoon, TAI Director

Phone 910-893-1387

Fax 910-893-1930

Email [witerspoon@campbell.edu](mailto:witerspoon@campbell.edu)

Mail

Trust Advisors Institute

Campbell University

PO Box 218

Buies Creek, NC

27506



TRUST ADVISORS  
INSTITUTE

Additional information about TAI,  
including online registration is available at  
<https://business.campbell.edu/trust-advisors-institute>