



## Attention CEOs, CELOs, Board of Directors, Committee Members & Staff

*The Capitol Area Chapter invites all Michigan Chapters to attend:*

### **Specialty/Fiduciary Accounts: The Everyday Essentials**

**Tuesday, March 10, 2026**

*The aging of the Baby Boomer population and their desire to protect their assets and provide direction to their heirs has resulted in increased use of trusts and fiduciary documents to do so. This session will concentrate on the complex issues involving their use. It will provide guidelines to assist your credit union when opening trust accounts; how to handle power of attorney issues, and how to avoid liability with other representative account issues. As an attendee, you will also have the opportunity to participate in a Q & A forum to address any outstanding questions regarding specialty accounts.*

*Facilitated by Dan Holzman, Holzman Law*

#### **Session Information:**

**Location:** Consumers Credit Union  
6935 South Cedar St. Lansing, MI 48911  
**OR**  
**Virtual**

**Session Time:** 9:00 a.m. to 12:00 p.m.  
**Cost:** \$69.00 in-person/attendee, \$49.00 virtual/attendee

#### **Registration Information:**

*To register for the upcoming session, select the link below and complete a registration form for each participant.*

**Registration Link:**  
<https://forms.gle/GH4XqaeqttScSNeB8>

*Deadline to register is  
March 5, 2026*

#### **Payment Details:**

##### **To pay using check:**

*Make check payable to Capitol Area Chapter of Credit Unions  
Attention: Jessica Julian  
CASE CU / 4316 S. Pennsylvania Ave. / Lansing, MI 48910  
Ph.: 517.393.7710 Ext. 1057*

*(Please note the name of the session participant(s) with check sent)*

**To pay using PayPal:**  
<https://paypal.me/CapitalAreaCUS>

*A PayPal account must be established to use this method of payment*

*Recipient Name: Capitol Area Chapter of Credit Unions*

*Please note the name(s) of the registered participants in the "Add a Note" section of the payment screen*