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October Event

Zoom presentation by Caitlin DiMillo, Lauren Epstein & Alexander Latendresse

**Thursday, October 21, 2021
3:00 – 4:30 PM**

Topic: Fiduciary Issues in Trust Administration

Please join the Maine Estate Planning Council for a presentation on Fiduciary Issues in Trust Administration featuring Caitlin DiMillo of Spinnaker Trust, Lauren Epstein of Camden National Wealth Management, and Alexander Latendresse of Portland Trust Company. In this program, our speakers will discuss managing relationships with grantors and beneficiaries, distribution standards and the decision-making process, fiduciary liability, and legal tools available for maintaining flexibility with trusts.

About the Speakers:

Caitlin DiMillo, JD

Caitlin is a Vice President and Chief Trust Officer at Spinnaker Trust, where she oversees all aspects of the fiduciary administration of accounts. Caitlin works with clients on all types of trusts, frequently providing guidance on complex issues of wealth transfer, estate, gift and tax planning.

Lauren Epstein, JD

Lauren is the Senior Vice President, Director of Client Services for Camden National Wealth Management. In her role, Lauren manages relationships with individual and institutional clients. Her experience in planning and administration has built a strong foundation for the advice she provides to clients.

Alexander Latendresse, JD.

Alex Latendresse is a Trust Officer at Portland Trust Company, who previously practiced trusts and estates law at law firms, first in New York City and then in Maine, where his practice focused entirely on trusts and estates law, including planning, administration and related litigation. Alex graduated from Bowdoin College as a Sarah and James Bowdoin Scholar in 2011 and earned his J.D. from the University of Maine School of Law, cum laude, in 2014.

**ZOOM MEETING DETAILS WILL BE PROVIDED TO
REGISTRANTS ON WEDNESDAY OCTOBER 20TH**