

**TENTATIVE
AGENDA***

JOINT COMMITTEE ON FIDUCIARY FINANCIAL INSTITUTIONS OVERSIGHT

November 21, 2024

Thursday, November 21
All-day Session
Room 144-S — Statehouse
Harmony:
YouTube:

- 9:00 a.m. Welcome and Introductions; Approval of November 7, 2023, Minutes
- 9:05 a.m. Overview of Technology Enabled Fiduciary Financial Institutions Act and Statutory Requirements
- David Wiese, Senior Assistant Revisor, Kansas Office of Revisor of Statutes
- 9:35 a.m. Updates on Fiduciary Financial Institutions' Operation in the State of Kansas
- Brad Heppner, CEO & Chairman of the Board, Beneficient Fiduciary Financial
 - Derek Fletcher, President & Chief Fiduciary Officer, Beneficient Fiduciary Financial
 - Alan Deines, Managing Director & Chief Operating Officer, Beneficient Fiduciary Financial
 - Greg Woodyard, SVP & Senior Accounting Officer, Beneficient Fiduciary Financial
 - Jeff King, Crossroads Legal Solutions
 - David Herndon, State Bank Commissioner, Office of State Bank Commissioner
- 10:45 a.m. Update on the Technology-enabled Fiduciary Financial Institutions Development and Expansion Fund and Distribution to Economic Growth Zones and Promotion of Development, Growth, and Expansion
- Rachel Willis, Director of Legislative Affairs, Kansas Department of Commerce
- 11:15 a.m. Committee Discussion with Conferees and Discussion and Recommendations to Legislature
- 12:00 p.m. Lunch
- 1:30 p.m. Committee Discussion and Recommendations, continued
- 2:30 p.m. Adjourn

* Any individual with a disability may request accommodation in order to participate in committee meetings. Requests for accommodation should be made at least two working days in advance of the meeting by contacting Legislative Administrative Services at (785) 296-2391 TTY: 711