



# NEWS RELEASE

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## ABA PARTNERS WITH MONEY MANAGEMENT INSTITUTE

WASHINGTON, Jan. 4 – The American Bankers Association has joined forces with the Money Management Institute to host the ABA Managed Account Forum. Themed “Managed Account Solutions for Banks: The Road to Change,” this forum will discuss the challenges bankers face within trust and wealth account management, March 27-28, in Orlando, Fla., immediately following ABA’s Wealth Management Conference.

“ABA and MMI have put together a unique learning experience to share success and challenges,” said Doug Adamson, executive director of the ABA’s Professional Development Group. “The forum will provide new ways to help bankers thrive in an ever more competitive environment.”

Private banks are showing double-digit growth rates within their managed account programs as more wealthy consumers turn to their banker for advice. More than 100 senior trust and wealth professionals from top banking organizations will gather to exchange ideas and solutions for a continuously evolving market.

Sessions during the two-day conference will address such issues as:

- Becoming an indispensable financial advisor to affluent families
- Using real-world case studies to develop and implement a successful separately managed accounts bank program
- The implications of banks offering overlay portfolio management.

For more information, please visit [www.aba.com](http://www.aba.com).

*The American Bankers Association, on behalf of the more than two million men and women who work in the nation's banks, brings together all categories of banking institutions to best represent the interests of this rapidly changing industry. Its membership-which includes community, regional and money center banks and holding companies, as well as savings associations, trust companies and savings banks-makes ABA the largest banking trade association in the country.*

*MMI is the national organization for the managed account solutions industry, representing portfolio manager firms and sponsors of investment consulting programs. Financial advisor's employing managed investment solutions on behalf of their clients typically perform several valuable services including development of a sophisticated analysis of the client's financial needs, determination of appropriate investment objectives, and the selection and monitoring of independent professionals who manage the client's funds according to specific disciplines and styles.*

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**Note to editors:** Complimentary press registration to the conference is available by contacting Susan Besaw at (202) 663-5469 or sbesaw@aba.com. Or, register online at [www.aba.com](http://www.aba.com)

