

ITMA

WORKING AGENDA

TRIBAL and INDIVIDUAL TRUST FUNDS & ASSETS ISSUES “LISTENING CONFERENCE”

HOSTED BY
NEZ PERCE TRIBE

@
Clearwater River Casino & Resort
(Located on the Nez Perce Reservation)
17500 Nez Perce Road
Lewiston, ID 83501

•
May 23 & 24, 2007

WEDNESDAY – May 23, 2007

8:30 a.m.CONTINENTAL BREAKFAST

9:00 a.m. Opening & Welcoming.....The Honorable Samuel Penney
Nez Perce Tribal Chairman
& ITMA Board Member

Invocation.....Julia Davis-Wheeler
NPTEC Chaplain

Introductions.....Mary Zuni-Chalan
ITMA Executive Director

Keynote on Trust Issues.....The Honorable Sam Penney
Chairman, Nez Perce Tribe

**Agenda Overview & Purpose of Conference.....Mary Zuni-Chalan
ITMA Executive Director**

**9:40 a.m. ITMA Monitoring Report of OST Activities.....Majel Russell, Esq.
ITMA Legal Consultant**

**10:00 a.m. Office of the Special Trustee Report & Open Discussion
Ross O. Swimmer, Special Trustee for American Indians
Donna Erwin Principal Deputy Special Trustee
Doug Lords, Deputy Special Trustee
Thomas Reynolds, Regional Trust Administrator
Debra Dumontier, Fiduciary Trust Officer
Frank Perniciaro, External Affairs Acting Director
Patricia Gerard, Grants Officer/Technical Representative**

11:00 Break

**11:15 a.m. Bureau of Indian Affairs Report & Open Discussion
BIA Regional Office, Regional Director, Stanley Speakes
BIA Northern Idaho Agency, Acting Superintendent David Shaw
BIA Plummer Agency, Acting Superintendent Greg Argel**

~ ~ ~
*OST AND BIA STAFF WILL BE AVAILABLE FOR ON-SITE
DISCUSSIONS WITH INDIVIDUALS REGARDING THEIR IIM ACCOUNTS AND
CONFIDENTIAL ISSUES THROUGHOUT THE 'LISTENING CONFERENCE'*

12:15 p.m. Lunch

**1:30 p.m. TRIBAL & INDIVIDUAL TESTIMONIALS - LISTENING SESSION #1
Facilitator: Mary Zuni-Chalan**

Panel #1: Tribal Council Representatives

Tribal Council Representatives:

2:30 p.m. OST & BIA RESPONSES TO PANEL

3:00 p.m. 10 Minute Break

3:10 p.m.

Panel #2 – Tribal Council or Registered Presenters - 10 Minute Presentations

Indian Landowner _____
Tribe: _____

Indian Landowner _____
Tribe: _____

Indian Landowner _____
Tribe: _____

Indian Landowner _____
Tribe: _____

4:00 p.m. OST & BIA RESPONSES TO PANEL

4:30 p.m. Recess until tomorrow morning at 9:00 a.m.

THURSDAY, May 24, 2007

8:30 a.m.CONTINENTAL BREAKFAST

9:00 a.m. Opening & Announcements

9:05 a.m. TRIBAL INDIVIDUAL TESTIMONIALS - LISTENING SESSION #2
Facilitator: Mary Zuni

Panel #1 – Registered/On-Site Presenters - 10 Minute Presentations

Indian Landowner _____
Tribe: _____

Indian Landowner _____
Tribe: _____

Indian Landowner _____
Tribe: _____

Indian Landowner _____

Tribe: _____

10:15 a.m. OST & BIA RESPONSE TO PANEL

10:45 a.m. 15 Minute Break

11:00 a.m.

Panel #2 – Registered/On-Site Presenters - 10 Minute Presentations

Indian Landowner _____
Tribe: _____

Indian Landowner _____
Tribe: _____

Indian Landowner _____
Tribe: _____

Indian Landowner _____
Tribe: _____

11:45 a.m. OST & BIA RESPONSE TO PANEL

12:15 p.m. CONCLUSION & ADJOURNMENT OF LISTENING CONFERENCE

~ ~ ~

Tribal Sponsored Training following ITMA Listening Conference

1:30 p.m. - 3:30 p.m. Training Session (no fee)

"The American Indian Probate Reform Act"

- ***Probate and Trust Property (Will writing)***
- ***Consolidation options for trust land owners and tribes***
- ***New "partitioning" permitting co-owners or tribe to petition and purchase all interests***

Presented by: Institute for Indian Estate Planning and Probate