New Ideas in the Old West

September 14-16, 2005
The Gaylord Texan Resort and Convention Center
Grapevine, Texas
... Where Dallas & Fort Worth Meet

Co-hosted by
The Estate Planning Council of North Texas
Please check all that apply.

- Affiliated Local Council Administrator (no charge)
- Affiliated Local Council Board Member
- Affiliated Local Council Member
- NAEP Member At-Large
- NAEP Past President

Early rate applies for registrations received prior to July 15, 2005.
Regular rate applies to registrations received on or after July 15, 2005.

<table>
<thead>
<tr>
<th>Early</th>
<th>Regular*</th>
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<td>$450</td>
<td>$495</td>
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Council Leadership Day Package
Includes Council Leadership Day sessions, technical education sessions, presentation material, conference breakfasts & luncheons, the Wednesday evening Welcome Reception & the Thursday Social Event.

2-Day Conference Educational Package
$395  $450*
Includes the Wednesday evening Welcome Reception, technical education sessions, presentation material, conference breakfasts & luncheons & the Thursday Social Event.

Companion Registration Package
$225  $225
Includes conference breakfasts, transportation to and from the companion tours, the Wednesday evening Welcome Reception and the Thursday evening Social Event.

*A $50 Late Fee will be applied to ALL registrations postmarked on or after August 15, 2005.

- I am a Council Leadership Day Package Registrant
  - I will attend the Welcome Reception on Wed., September 14, 2005
  - I will attend the Social Event on Thur., September 15, 2005
  - I have chosen technical education breakout sessions from the shaded box below

- I am a 2-Day Conference Educational Package Registrant
  - I will attend the Welcome Reception on Wed., September 14, 2005
  - I will attend the Social Event on Thur., September 15, 2005
  - I have chosen technical education breakout sessions from the shaded box below

- I am registering as a Companion
  - I will attend the Wed., September 14, 2005 trip to Fort Worth
  - I will attend the Welcome Reception on Wed., September 14, 2005
  - I will attend the Thur., September 15, 2005 trip to Grapevine
  - I will attend the Social Event on Thur., September 15, 2005
  - I will attend the Fri., September 16, 2005 trip to Dallas

Fee Computation
Primary Registrant Fee
Companion Registrant Fee
Late Fee ($50 if postmarked later than 8/15/05)
TOTAL ENCLOSED

Technical Education Breakout Session Choices

<table>
<thead>
<tr>
<th>Thursday, September 15, 2005</th>
<th>10:30 am - 11:15 am</th>
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<tr>
<td>Drafting Technology: Quicker, Better, More Accurate, Cheaper - With Style</td>
<td>Thomas C. Baird, JD &amp; Michael V. Boutrout, JD, LL.M</td>
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<td>Core &amp; Maintenance of FLPs: William R. Cousins, III, JD, LL.M., CPA</td>
<td>The Bank Steps Here - W. Michael Cox</td>
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A block of rooms has been reserved at the Gaylord Texan Resort & Convention Center located at 1501 Gaylord Trail in Grapevine, Texas. A special rate of $169 has been made available for conference attendees. To make reservations, call the hotel directly at (866) 782-7897 no later than Monday, August 15, 2005. Be sure to reference the National Association of Estate Planners & Councils when calling. Reservations made after August 15, 2005 cannot be guaranteed at the group rate. For more information about the Gaylord Texan Resort & Convention Center, please visit their website at www.gaylordhotels.com.

Any cancellation of a conference registration must be received in writing. A full refund will be given if notice is received on or before June 30, 2005. Registrants who cancel between July 1, 2005 and August 31, 2005 will forfeit a $100 administrative fee. No refunds will be granted after September 1, 2005. Refund or credit will not be issued to no-show registrants.

To receive CE credit – guidelines require:
• being on time and staying through the entire conference
• receiving verification of attendance upon exiting
• completing any necessary forms or paperwork

The NAEPC will file a credit request for the following disciplines or types of credit; CTFA, PACE and CFP®.

The NAEPC recommends a total of 13 credits for CPA’s, 11.25 in Specialized Knowledge and Applications and 1.75 in Taxation. “New Ideas in The Old West” is an advanced educational program and preparation is not required prior to attending. The National Association of Estate Planners & Councils is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPA Credit. Complaints regarding registered sponsors may be addressed to the National Registry CPD Sponsors, 150 Fourth Avenue North, Ste. 700, Nashville, TN, 37219-2417. Website: www.nasba.org

For more information regarding administrative policies such as complaint and refund, please contact the NAEPC office at (866) 226-2224.

Detailed airport information about the Dallas/Fort Worth International Airport can be found on their website, http://www.dfwairport.com

The NAEPC has arranged for special discounts on flights to Dallas/Fort Worth Airport between September 10, 2005 and September 18, 2005 on American Airlines, the official airline of the NAEPC’s 42nd Annual Conference. To purchase tickets at the discounted rate, call the American Airlines Meeting Services desk at (800) 433-1790. Be sure to reference file number A7195AA when making your reservations. Additional discounts apply when making reservations more than 30 days prior to your departure.

Weather in the Dallas/Fort Worth area mid-September is pleasant. Guests are urged to prepare for nights in the upper 60s and days in the mid 80s.

Business casual attire is the conference standard. Casual dress is strongly recommend for the Thursday Social Event to the Fort Worth Stockyards, Billy Bob’s Texas, and Joe T. Garcia’s.
COMPANION PROGRAM

Companion Registrant Information – $225 Companion Conference registration fee includes all breakfasts, Wednesday evening Welcome Reception, transportation to and from the companion tours and the Thursday evening Social Event. Educational sessions are not available to companions.

WEDNESDAY, SEPTEMBER 14, 2005
FORT WORTH, TEXAS...THE MUSEUM CAPITAL OF THE WEST!

In this single city, you can explore a truly incredible array of Fort Worth museums – from the artistic to the historic, from the ancient to the modern.

In the cultural district, you’ll find many sensational Fort Worth museums within easy walking distance of one another – including the Kimbell Art Museum, the Modern Art Museum of Fort Worth, the Fort Worth Museum of Science and History, the Amon Carter Museum and the National Cowgirl Museum & Hall of Fame. Many Fort Worth museums are devoted to the city’s rugged, colorful past, including the Cattle Raisers Museum and the Stockyards Museum.


THURSDAY, SEPTEMBER 15, 2005
GRAPEVINE, TEXAS...WHERE DALLAS & FORT WORTH MEET!

Listed on the National Register of Historic Places, downtown Grapevine and its surrounding areas have a variety of attractions waiting for you! Grapevine is home to many wineries and tasting rooms as well as the Texas Wine and Grape Growers Association.

Step back in time and relive the proud heritage of Grapevine’s forefathers. Walk along the avenues of the historic Main Street District. Interested in shopping? Whether you’re on historic Main Street or at one of our shopping centers, Grapevine delivers. A specific schedule of events will be released closer to this companion tour.

Specific Grapevine, Texas information can be found online at www.grapevinetexasusa.com.*

FRIDAY, SEPTEMBER 16, 2005
DALLAS WEST END HISTORIC DISTRICT

The West End, Dallas’ true historic district, sets the stage for the story of Dallas when it was first settled in the mid-1800’s. Since then, chapters continue to unfold daily along its picturesque streets and within its buildings.

What makes the West End unlike any other area of Dallas? It offers visitors a window into the past with beautifully preserved and masterfully renovated historical buildings. The West End also provides a host of recreational opportunities such as retail attractions, fascinating museums, exciting nightlife, and a variety of cultural events. Visitors enjoy all of this in one of the most “happening” neighborhoods in Dallas. There is something for everyone and you’ll find it along the tree-lined streets and brick sidewalks.

This area features The Sixth Floor Museum at Dealey Plaza, the John F. Kennedy Monument, a variety of shopping venues, and an outstanding collection of restaurants. Visit www.dallwestend.org for more information.*

Thursday’s Social Event for all attendees
A Trip on the Grapevine Vintage Railroad to the Fort Worth Stockyards,
Dinner at Joe T. Garcia’s & Dancing Lessons at Billy Bob’s Texas

THURSDAY, SEPTEMBER 15, 2005 – 5:30 PM

Our group will leave the hotel and head over to the Grapevine Vintage Railroad depot for a trip into the Fort Worth Stockyards. From there, we’ll move over to world famous Joe T. Garcia’s for dinner. Joe T. Garcia’s Mexican Restaurant was established on July 4, 1935 by Mr. and Mrs. Joe T. Garcia. With a seating capacity of only sixteen, Joe, his wife, and their five children ran their tiny business with love and determination. By the 1970’s Joe T. Garcia’s was one of the most popular restaurants in the Dallas-Fort Worth area. With their loyal customers, the restaurant began to grow not only in popularity but also in size. The restaurant now seats hundreds! After dinner, the group will be bussed to Billy Bob’s Texas, “the World’s Largest Honky Tonk”, for country line dancing lessons! The building now known as Billy Bob’s Texas was built in 1910 and was once a large open-air barn for housing prize cattle during the Fort Worth Stock show. The facility now features concerts and live bull riding on the weekends!

Casual attire is recommended for this event.
Council Leadership Day is designed to be a sharing session among leaders of NAEPC Affiliated Local Councils. The morning is dedicated to the National Association of Estate Planners & Councils Annual Meeting, while afternoon sessions will be committed to leadership development. The attendee can expect to interact with fellow volunteer leaders, attend breakout sessions designed for idea sharing & growth and learn about ongoing NAEPC programs and services.

It is the NAEPC’s belief that an important part of leadership development and knowledge lies within Council staff. As such, Administrators (paid Council staff) are encouraged to attend Council Leadership Day.

COUNCIL LEADERSHIP DAY SCHEDULE*

8:00 am - 8:30 am
Breakfast

8:30 am - 10:00 am
NAEPC Annual Meeting

10:00 am - 10:45 am
Break

10:45 am - 12:00 noon
“Focus Group” Sessions with NAEPC leaders and staff

12:00 noon - 1:00 pm
Lunch

1:00 pm- 5:00 pm
Council Leadership Sharing Sessions
Concurrent Session for Administrators

5:30 pm - 7:30 pm
Welcome Reception for council leaders, administrators and educational attendees.

* A detailed schedule will be released closer to the event.

“Having participated in Council Leadership Day for the past two years, I would highly recommend that my fellow officers consider attending. The session is not just for Council Presidents; it was a great way to learn more about our national organization and to prepare for a primary leadership role. Officers from a wide variety of membership sizes and geographic locations create a real synergy, leading to creative, alternative solutions for the challenges that all our councils face today.”

June A. Seech, Treasurer
Estate Planning Council of Cleveland

“Getting to know administrators from other councils and exchanging ideas was very beneficial. I look forward to meeting with many in Texas - and even more in New Orleans in 2006!”

Leila Schumacher, Executive Director
New Orleans Estate Planning Council
Program

Wednesday, September 14, 2005

5:30 pm-7:30 pm
Welcome Reception for all Attendees

Thursday, September 15, 2005

7:00 am-8:00 am
Breakfast

8:00 am-8:15 am
Welcome & Opening Remarks

8:15 am-10:00 am
“Practical Planning for Retirement Benefits (What to do for Real Clients in Real Life)”
Natalie B. Choate, Esq., AEP

10:00 am-10:30 am Break

10:30 am-11:15 am (Breakout Sessions, indicate choice on registration form)
“Drafting Technology: Quicker, Better, More Accurate, Cheaper – With Style”
Thomas C. Baird, JD & Michael Bourland, JD, LL.M.

“Care and Maintenance of FLP’s”
William R. Cousins, Ill, JD, LL.M., CPA

“The Bunk Stops Here”
W. Michael Cox

“Advanced Care Planning – It’s Not Just About Insurance”
Mike Seefeld, MS, CPA

11:30 am-12:15 pm
“Exercising Discretion in Discretionary Trusts”
Susan Porter, JD, LL.M., CTFA, AEP

12:15 pm-1:15 pm Lunch

1:15 pm-2:00 pm “Dimensioning Charitable Remainder Trusts”
Paul S. Lee, JD, LL.M.

2:00 pm-2:45 pm “Offshore Trusts and Related Wealth Preservation Strategies”
Mario A. Mata, JD, CPA

2:45 pm-3:15 pm Break

3:15 pm-5:00 pm “Latest Planning Strategies”
Jonathan G. Blattmachr, JD

5:30 pm Social Event – see “Companion Program” page for more details.

Attendees must stay through the entire conference to receive CE Credit.

Speakers

Thomas C. Baird, JD
Thomas C. Baird is President and Shareholder of Baird, Crews, Schiller & Whitaker, P.C. He is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization. Mr. Baird is a frequent author and lecturer for CLE programs, including the State Bar of Texas, American Bar Association, American College of Trust and Estate Counsel and Notre Dame Tax and Estate Planning Institute.

Jonathan G. Blattmachr, JD
Jonathan Blattmachr is a partner in the law firm of Milbank, Tweed, Hadley & McCullough LLP. He has served as a lecturer on law of the Columbia University School of Law and an Adjunct Professor of Law at New York University School of Law. He is a former chairperson of the Trusts & Estates Law Section of the New York State Bar Association and of other committees of the New York State Bar Association and the American Bar Association. Mr. Blattmachr is a Fellow and a former Regent of the American College of Trust and Estate Counsel and past Chair of its Estate and Gift Tax Committee. He is an author or co-author of over 250 articles and four books on estate planning topics. He was the Editor of The Close Review, during its entire 18 year publication history by The Chase Manhattan Bank. Mr. Blattmachr also is a co-developer of Wealth Transfer Planning, a software system published for lawyers which provides specific client advice and automated document assembly for wills, trusts, powers of attorney and other estate planning documents.

Michael V. Bourland, JD, LL.M.
Mr. Bourland is the founding shareholder of Bourland, Wall & Wenzel, P.C., a Fort Worth law firm which represents individuals, closely held family businesses, professional practices and charitable organizations within its areas of legal practice. Mr. Bourland’s practice is directed to business, tax, estate and trust planning. He represents individuals, charitable entities, trusts, charitable giving vehicles, and has received his B.A. and J.D. degrees from Barstow University and an LL.M. in Taxation from the University of Florida, Miami.

Natalie B. Choate, Esq., AEP
Natalie B. Choate, Esq. is an attorney with the Boston law firm of Bingham McCutchen LLP. Her practice is limited to estate planning for retirement benefits. Her book, Life and Death Planning for Retirement Benefits is a popular resource for estate planning and money management professionals. Ms. Choate is the founder and former Chairman of the Boston Bar Association Estate Planning Committee. She is a regent of the American College of Trust and Estate Counsel, and a member and former officer of the Boston Probate and Estate Planning Forum. Her publications include articles for ACTEX, Note: Estate Planning, Trusts and Estates, Tax Practitioners Journal and Tax Management. She is an editorial board member of Trusts and Estates, and Senior Editor of Leimberg’s Employee Benefits, Retirement Newsletter and Keeping Current.

Thomas F. Committo, JD, LL.M., CLU, CFP
Thomas F. Committo is Vice President - National Accounts and Advanced Support for CGI National Life Brokerage. A well-known speaker, he has spoken at many industry meetings, including the AALU meeting in Washington, DC; the Annual Meeting of NASB, the International Association of Financial Planners and MDRT. He is the author of more than 30 articles on insurance and taxation. He recently completed the book, Working with LLCs: A Practitioner’s Guide to Limited Liability Companies, published by The National Underwriter Company.

William R. “Trey” Cousins, III, JD, LL.M., CPA
Trey Cousins is a partner with the law firm of Meadows, Owens, Collier, Reed, Cousins & Blau, LLP based in Dallas, Texas. He specializes in representing taxpayers in tax controversies, both administratively and through litigation. He has experience in criminal tax and white collar defense, and has tried numerous civil tax cases in District Tax Court. Mr. Cousins is a past winner of the Tax Court Judicial Conference. Mr. Cousins is an active speaker on substantive and procedural tax issues for the Texas Society of CPAs, TSCPA Chapters and the State Bar of Texas.

Deborah Cox, JD
Deborah Cox is Managing Director and Wealth Advisor with JP Morgan Private Bank. She provides advice on wealth structuring solutions related to estate planning, family governance, business succession, philanthropy, charitable giving, and tax planning. Debbie is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization.

W. Michael Cox
Michael Cox is Senior Vice President and Chief Economist at the Federal Reserve Bank of Dallas. He advises the Bank President on monetary policy and economic issues and heads the free enterprise research group. Mr. Cox authors the Bank’s annual report, essays on using American living standards and the New Economy. These reports have received extensive attention from leading publications, including the Wall Street Journal, New York Times, USA Today, Los Angeles Times, Forbes, Fortune, Business Week and Investors Business Daily, which reach an audience of over 200 million. He is also widely published in the nation’s leading economics journals, such as the Journal of Monetary Economics and the Review of Economics and Statistics.

Jaye Crowder, M.D.
Jaye Crowder obtained his undergraduate degree in Pre-Medical Science at Abilene Christian University in 1977. He went on to obtain his M.D. degree at U.T. Southwestern in 1980. Dr. Crowder performed a post-doctoral fellowship at The University of Virginia in Forensic Psychiatry disciplines during 1984-1985. Dr. Crowder did his internship and residency training at U.T. Southwestern completing it in 1984. Dr. Crowder joined the U.T. Southwestern Faculty in 1985. His departmental activities include Assistant Residency Training Director, Psychotherapy Supervisor, and Consultation/Liaison Attending Psychiatrist. Dr. Crowder’s clinical expertise is in the areas of Individual Psychotherapy and Forensic Consultation. Dr. Crowder’s research interests are in the areas of Forensic Profiling and Consultation/Liaison Psychiatry. He also serves as President of Hope for Children Foundation.

James M. “Mike” Hill, FASA, CBA
Mike Hill has extensive experience in valuing closely held businesses and equity ownership in connection with tax planning, estate planning, estate valuations, divorce and commercial litigation and is a recognized leader in the business appraisal industry. He has been an active member of the American Society of Appraisers since 1981, most recently serving as the chairman of its Long Range Planning Committee. Mike is past Chairman of the Business Valuation Committee of the ASA and former Trustee and past Chairman of The Appraisal Foundation. He was elected to the College of Fellows of the American Society of Appraisers in 1997 and is a Certified Business Appraiser of the Institute of Business Appraisers. He currently serves on the Appraisal Foundation Trust and as a Director of the Center of Advanced Property Economics.
PROGRAM
FRIDAY, SEPTEMBER 16, 2005

7:00 am-8:00 am
Breakfast

8:00 am-8:15 am
Recognition of 2005 Distinguished Accredited Estate Planners

8:15 am-10:00 am
“Recent Developments Affecting Estate Planning”
Stanley M. Johanson, JD., LLM.

10:00 am-10:30 am
Break

10:30 am 1:15 am
(Breakout Sessions, indicate choice on registration form)

“Shrink Shrink Shrunken, Shrinking Capacity and Competence”
Jaye Crowder, M.D.

“What to Look For in a Business Valuation Report for Your Clients”
James M. Hill, FASA, CBA

“How to Work Out of Trust Mills”
Elizabeth A. Howard, JD

11:30 am-12:15 pm
“What’s Hot What’s Not — New Approaches in Life Insurance Planning”
ThomasF . Comito, JD, LL.M., CLU, ChFC

12:15 pm-1:15 pm
“Laughter is Lawful”
Lunch with J.B. Smith
Rancher & Shri f of Smith County, Texas

1:15 pm-2:00 pm
“Estate Planning with Restricted Securities”
Deborah Cox, JD

2:00 pm-2:45 pm
“Governance and Regulatory Developments in Exempt Organizations Law”
Terry L. Simmons, JD, LL.M.

2:45 pm-3:15 pm
Break

3:15 pm-5:00 pm
“An Update on Current Estate Planning Changes”
Jeffrey N. Pennell

Attendees must stay through the entire conference to receive CE Credit.
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