Co-hosted by
The Estate Planning Council of Northeast Florida
Please check all that apply.

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

Early rate applies for registrations received prior to August 31, 2006. Regular rate applies to registrations received on or after August 31, 2006.

<table>
<thead>
<tr>
<th>Package</th>
<th>Early</th>
<th>Regular*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council Leadership Day Package</td>
<td>$495</td>
<td>$550</td>
</tr>
<tr>
<td>Conference Educational Package</td>
<td>$395</td>
<td>$450</td>
</tr>
<tr>
<td>3-day Companion Registration Package</td>
<td>$275</td>
<td>$275</td>
</tr>
</tbody>
</table>

*A $50 Late Fee will be applied to ALL registrations postmarked on or after October 13, 2006.

I am a Council Leadership Day Package Registrant
- I will attend the Welcome Reception on Wed., November 1, 2006
- I will attend the Social Event on Thur., November 2, 2006
- I have chosen technical education breakout sessions from the shaded box below

I am a Conference Educational Package Registrant
- I will attend the Welcome Reception on Wed., November 1, 2006
- I will attend the Social Event on Thur., November 2, 2006
- I have chosen technical education breakout sessions from the shaded box below

I am a 3-day Companion Registration Registrant
- I will attend the Wed., November 1, 2006 trip to Fernandina Beach
- I will attend the Welcome Reception on Wed., November 1, 2006
- I will attend the Thur., November 2, 2006 trip to St. Augustine
- I will attend the Social Event on Thur., November 2, 2006
- I will attend the Fri., November 3, 2006 trip to Kingsley Plantation

Mail registration and check to:
National Association of Estate Planners & Councils
1120 Chester Ave., Suite 470
Cleveland, OH 44114-3514
Or register online at www.naepc.org
Or fax registration with credit card information to: 216-696-2582

- VISA
- MasterCard
- American Express

Technical Education Breakout Session Choices

<table>
<thead>
<tr>
<th>Thursday, November 2, 2006</th>
<th>11:10 am - 12:10 pm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estate &amp; Gift Tax Update – What’s New at the IRS</td>
<td>Martin E. Bossin, JD &amp; Aileen F. Condon</td>
</tr>
<tr>
<td>Special Needs Trusts and Medicaid Planning</td>
<td>Rebecca L. Berg, JD, CELA</td>
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<tr>
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<td>Clearasil, McDonalds, and Long Term Care</td>
<td>Arthea Staeger Reed, Ph.D.</td>
</tr>
</tbody>
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<th>Friday, November 3, 2006</th>
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<td>Richard L. N. Weaver</td>
</tr>
</tbody>
</table>
GENERAL INFORMATION

LODGING INFORMATION

The conference is located at the Amelia Island Plantation (www.aipfl.com). The resort is a AAA-Four Diamond, 1350 acre property with four 18-hole championship golf courses & 23 clay tennis courts located just 30 miles North of Jacksonville. The Amelia Island Plantation also features a health and fitness center, award-winning youth programs, fine shops, a full service spa and excellent choices of dining options.

Amelia Island, FL is one of America’s few remaining unspoiled island paradises and is the southernmost of the chain of Atlantic coast barrier islands that stretch from North Carolina to Florida. Its rich history, 13 miles of uncrowded beaches, lush, natural setting, moss-covered oaks, unparalleled golf, boating, and fishing, stunning sunrises and sunsets, and friendly “locals” make it more than just a place to visit.

A block of rooms has been reserved at the Amelia Island Plantation located at 6800 First Coast Hwy., on Amelia Island, FL. A special rate of $179 has been made available for conference attendees. To make reservations, call the hotel directly at (888) 261-6165 no later than Sunday, October 1, 2006. Be sure to reference Group Number 8AR355 when calling. Reservations made after October 1, 2006 cannot be guaranteed at the group rate.

CONTINUING EDUCATION

To receive CE credit – guidelines require:

• being on time and staying through each session
• completing any necessary forms or paperwork

Governing bodies do not permit any deviation from these requirements.

Legal and insurance credit requests will be filed in Georgia and Florida. The NAEPC will provide documentation to assist those in states other than Georgia and Florida in applying for credit in their home state, but cannot guarantee acceptance of the course for credit.

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 12 credits for CPA’s in Specialized Knowledge and Applications. The NAEPC’s 43rd Annual Conference 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 CPE 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.

CANCELLATION POLICY

Any cancellation of a conference registration must be received in writing. A full refund will be given if notice is received on or before September 15, 2006. Registrants who cancel between September 16, 2006 and October 13, 2006 will forfeit a $100 administrative fee. No refunds will be granted after October 13, 2006. Refund or credit will not be issued to no-show registrants.

GOLF INFORMATION

Winding along a coastal Atlantic dune ridge, Ocean Link’s #4, #5, #6, #15 and #16 provide golfers with five oceanfront golf holes. The fairways and greens are parallel to the beaches of Amelia Island and meander through a unique coastal maritime hammock. This close proximity to the ocean and the ever-changing sea breeze provide the golfer with exhilarating views and intriguing play.

NAEPC has reserved a limited number of tee times for Saturday, November 4, 2006. The discounted cost for 18-holes is $103 and includes greens fees and a cart. Please contact Ocean Links for reservations by calling 888.261.6161. Reservations will be accepted on a space-available basis and must be made by Friday, October 13, 2006.

More information about The Plantation’s remaining three courses can be found online at http://www.aipfl.com/golf/golf.htm.

PROGRAM MATERIALS & ROSTER OF ATTENDEES

All Council Leadership Day and Educational Registrants will receive the technical materials in two formats – a CD that contains long outlines from each speaker (if provided) and a binder that contains a short outline from each speaker (if provided). Registrants are encouraged to bring a laptop computer to access the materials on the CD. Long outlines will also be provided on the internet prior to the conference and each registrant will be furnished with a printed roster of attendees of those that registered prior to October 13, 2006.

AIRLINE DISCOUNT

Detailed airport information about the Jacksonville International Airport can be found on their website, http://www.jaxairport.org

The NAEPC has arranged for special discounts on flights to Jacksonville, FL between October 28, 2006 and November 6, 2006 on American Airlines, the official airline of the NAEPC’s 43rd 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 A34H6AI when making your reservations. Additional discounts apply when making reservations more than 30 days prior to your departure.

GROUND TRANSPORTATION

RENTAL CAR DISCOUNT — The NAEPC has arranged for special discount rates with Avis Rent-a-Car Systems, Inc. To make reservations, call Avis directly at (800) 331-1600 and reference AWD # J998224/National Association of Estate Planners & Councils.

Driving directions to the hotel can be obtained on the Amelia Island Plantation website (www.aipfl.com) or via an internet site such as www.mapquest.com.

TAXICAB & SHUTTLE DISCOUNT — Amelia Island Plantation offers a shuttle service to and from Jacksonville International Airport. The NAEPC has been granted a 10% discount off of the regular fare of $40 each way / $80 round trip. Advance reservations are required at least 48 hours prior to arrival and can be made by calling 888-261-6161, online at www.aipfl.com or via e-mail . For more information, visit the Transportation Pages of www.aipfl.com.
WEDNESDAY, NOVEMBER 1, 2006
FERNANDINA BEACH, FL . . . A QUaint HISTORIC SEAPort ON AMELIA ISLAND!

Discovered by French explorer Jean Ribault in 1562, Amelia Island’s endless blue skies and stunning sunsets attract more and more people each year. Many visitors to the island, however, simply enjoy strolling the streets of the downtown historic district, absorbing its rich cultural past. The heart of downtown is Centre Street, a charming eight-block corridor with pedestrian-friendly street-scaping leading to the Intracoastal Waterway and the Fernandina Harbor Marina, where shrimp boats unload catches and charter boats depart for sightseeing and fishing. Surrounding shops offer an array of art, antiques, apparel, books, candy, collectibles, dry goods, furnishings, gifts, jewelry, souvenirs, tobacco and toys. Cafes and restaurants provide a spectrum of cuisine.

THURSDAY, NOVEMBER 2, 2006
ST. AUGUSTINE . . . THE OLDEST CITY IN AMERICA!

St. Augustine, the nation’s oldest city, also holds the distinction of being one of the nation’s most charming. Known as the “Ancient City” St. Augustine’s attractions bring to life the history, adventure, and romance of the Old City. With more than four centuries of colorful local history to draw from, the more than 60 unique-themed attractions in St. Augustine bring to life the history and romance of the area. Complementing the historically-themed attractions are contemporary adventures never imagined by the ancient explorers. The combination of historic sites and modern-day storytelling make the attractions of St. Augustine one of the most popular features of the oldest, continuously occupied European settlement in the continental United States. This tour will offer participants the opportunity to visit the city on a guided trolley while maintaining the ability to step off the trolley and explore at various stops. For more information visit www.oldcity.com.

FRIDAY, NOVEMBER 3, 2006
KINGSLEY PLANTATION

During the eighteenth and nineteenth centuries, many people came to Florida. Some, like Zephaniah Kingsley, sought to make their fortunes by obtaining land and establishing plantations. Others were forced to come to Florida to work on those plantations, their labor providing wealth to the people who owned them. Some of the enslaved would later become free landowners, struggling to keep their footing in a dangerous time of shifting alliances and politics. All of these people played a part in the history of Kingsley Plantation. This tour will allow the participant to tour the grounds at Kingsley Plantation, which include the slave quarters, barn, waterfront, plantation house, kitchen house, and interpretive garden.

COMPANION PROGRAM

Companion Registrant Information – 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.

Thursday evening Social Event
Join fellow conference attendees for a family-friendly evening poolside – complete with waterfront sports!

THURSDAY, NOVEMBER 2, 2006 – 6:00 PM

Our group will remain on-property at The Plantation for this family-friendly social event! The evening will begin with cocktails and dinner poolside. From there, we will enjoy a bonfire and a variety of outdoor beachfront sports activities – including (but not limited to) badminton, volleyball and golf!

All guests must be registered for this event! Adult guests can be registered at a fee of $75 for this event only. Children under 12 must be registered in advance, but will be admitted at no charge.

This event is outdoors – please dress accordingly!
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. Over 40% of affiliated local councils are represented by officers and/or board members each year. Don’t miss the opportunity to share your council’s successes and learn how to overcome the struggles!

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 the Council Leadership Day activities at no charge.

**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

5:00 pm - 7:00 pm  
Welcome Reception for council leaders, administrators and educational attendees.

* A detailed schedule will be distributed via email closer to the event.

**HEAR WHAT PAST ATTENDEES ARE SAYING . . .**

“I have been attending Annual Meetings since becoming a member of NAEPC and would not miss them for any reason but health! It’s not just the educational quality of the formal meetings, but the exchange of ideas and comments with my peers at informal chats. Mostly, the meetings re-emphasize my belief in the concept of the various disciplines working together for the benefit of the client.”

Robert E. Fox, CLU, AEP  
Ocala, Florida
PROGRAM

WEDNESDAY, NOVEMBER 1, 2006

5:00 pm-7:00 pm
Welcome Reception for all Attendees

THURSDAY, NOVEMBER 2, 2006

7:00 am-8:00 am
Breakfast

8:00 am-8:10 am
Welcome & Opening Remarks

8:10 am-9:50 am
“Creative Uses (and Misuses) of Trusts”
Jonathan G. Blattmachr, JD, AEP

9:50 am-10:40 am
“Advanced Wealth Management and Legacy Planning Through Charitable Giving”
Allyson McDonald

10:40 am-11:10 am
Break

11:10 am-12:10 pm
(Breakout Sessions, indicate choice on registration form)

“Estate & Gift Tax Update – What’s New at the IRS”
Martin E. Basson, JD & Aileen F. Condon

“Special Needs Trusts and Medicaid Planning”
Rebecca L. Berg, JD, CELA

“Maximizing Both Spouse’s Exemptions – How to Create a Taxable Estate for the Less Wealthy Spouse”
Timothy L. Flanagan, JD, LL.M.

“Clearasil, McDonalds, and Long Term Care”
Arthea Staeger Reed, Ph.D.

12:10 pm-1:20 pm
Lunch

1:20 pm-3:00 pm
“Financial and Estate Life Coaching”
Scott C. Fithian,CLU, ChFC

3:00 pm-3:20 pm
Break

3:20 pm-5:00 pm
“Recent Developments in Estate Planning”
Jeffrey N. Pennell

6:00 pm
Poolside Social Event

SPEAKERS

MARTIN E. BASSON, JD
Martin E. Basson is the Supervisory Attorney, Estate & Gift Taxes, for the South Florida Territory of the Internal Revenue Service. He received his B.A. from Colgate University and his J.D. from St. John’s University School of Law. With the exception of serving as Assistant Tax Commissioner for the City of New York during the Koch Administration, Mr. Basson has worked for the IRS since 1974. Other positions he has held within the IRS include Supervisory Attorney (Estate and Gift), Manhattan District, and Senior Program Manager for both the Estate & Gift and the Engineering & Valuation Programs in the North Atlantic Regional Office. He has served as an Adjunct Professor of Law at the University of Miami Law School’s LL.M. Program in Estate Planning since 1993, has been a faculty member of Nova Southeastern University’s Planned Giving Program, and has served as the Editor of The Chase Review, during its entire 18-year publication history by The Chase Manhattan Bank.
Mr. Blattmachr is also 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.

NATALIE B. CHOATE, ESQ., AEP
Natalie Choate is an attorney with the Boston law firm of Bingham McCutchen LLP. Her practice concentrates in estate planning for retirement benefits. Her books, Life and Death Planning for Retirement Benefits and The QPRT Manual, are leading resources for estate planning professionals. Miss Choate is the founder and former chair of the Boston Bar Estate Planning Committee; a Fellow and former Regent of ACTEC; and chairman of its Employee Benefits Committee; and a member and former officer of the Boston Estate and Trusts Section of the American Bar Association.

AILEEN F. CONDON
Aileen Condon is the Chief, Estate and Gift Tax Program of the IRS, with national program responsibility for the policy, field and campus estate and gift tax operations. Before her current position in Small Business / Self-Employed, Aileen was a Specialist in Stakeholder Partnerships, Education and Communication territory manager in Wage and Investment. Aileen also held many positions in Examination Operations including branch chief in the Washington, DC, area, and division chief in St. Louis. Aileen was born in Charleston, South Carolina, graduated from the University of South Carolina in Columbia, and began her IRS career as a revenue agent in Spartanburg, South Carolina.

SCOTT C. FITHIAN, CLU, ChFC
Scott C. Fithian is recognized throughout the U.S. and Canada as a pioneer in the tools and methodology of Values Based Planning™. Throughout his work as a Wealth Coach, Scott helps individuals and families achieve happiness by making wise choices concerning their wealth. In 1998, Scott founded The Legacy Companies™ to help professional advisors learn and implement this proprietary business model into their own practices. Today, Legacy has clients throughout the U.S. and Canada who are successfully using this model with their clients. Scott has delivered over 1,000 presentations to diverse audiences including major corporations, industry associations, national conventions and non-profit organizations. In 2000, Scott published a book on the subject of Values Based Planning entitled A Step-by-Step Approach to Values Based Estate Planning (John Wiley and Sons).

TIMOTHY L. FLANAGAN, JD, LL.M.
Mr. Flanagan’s expertise lies in the area of estate planning and administration, including income, estate, gift and generation skipping transfer tax, probate, fiduciary law and other estate and trust matters, focusing on estates of significant size and complexity. He also represents and advises clients with closely held businesses on corporate matters, business succession and related estate and gift tax planning issues. Mr. Flanagan is a frequent lecturer and has published articles on taxation and estate planning in national periodicals and tax services. Mr. Flanagan is a Florida Bar Certified Tax Lawyer, serves on several committees of the Real Property Trusts and Estate Law Section of the Florida Bar, as well as a member of its Executive Council. He is a Fellow of the American College of Trust and Estate Counsel. Mr. Flanagan received a B.S. in Accounting from Florida Southern College, his J.D. from Cumberland School of Law at Samford University and a LL.M. in Taxation from the University of Florida.
FRIDAY, NOVEMBER 3, 2006

PROGRAM

7:00 am-8:00 am  Breakfast

8:00 am-8:15 am
Recognition of 2006 Distinguished Accredited Estate Planners
Presentation of 2006 Hartman Axley Lifetime Service Award

8:15 am-9:15 am
“7 Ways to Play, 7 Ways to Pay”
Stephan R. Leimberg, JD, AEP

9:20 am-10:20 am
(Breakout Sessions, indicate choice on registration form)

“The Annual Exclusion — A New Look at an Old Friend”
Lauren Y. Detzel, JD

“Using Disclaimers in an Uncertain and Changing Estate Planning Environment”
A. Stephen McDaniel, JD, AEP, EPLS

“Hedging Strategies”
Richard L. N. Weaver

10:20 am-10:50 am
Break

10:50 am-12:20 pm
“Uses (and Misuses) of FLP’s and LLC’s”
Louis A. Mezzullo

12:20 pm-1:20 pm
Lunch

1:20 pm-2:10 pm
“How to Wind Down Those Pesky QPRTs”
Natalie B. Choate, Esq., AEP

2:10 pm-2:30 pm
Break

2:30 pm-4:30 pm
“Death and Taxes: the Inherited Retirement Plan”
Natalie B. Choate, Esq., AEP

SPEAKERS

STEPHAN R. LEIMBERG, JD, AEP
Stephan R. Leimberg is CEO of Leimberg & LeClair, Inc., an estate and financial planning software company, President of Leimberg Associates, Inc., a publishing and software company in Bryn Mawr, Pennsylvania, and Publisher of Leimberg Information Services, Inc., which provides e-based news, opinion, and information for tax professionals. He is the author of numerous books on estate, financial, and employee benefit and retirement planning. A nationally known speaker, Professor Leimberg has addressed the Miami Tax Institute, the NYU Tax Institute, the Notre Dame Law School and Duke University Law School’s Estate Planning Conferences, the National Association of Estate Planners and Councils, and the AICPA’s National Estate Planning Forum. Leimberg has also spoken to the Federal Bureau of Investigation, and the National Aeronautics and Space Administration. He was awarded the Excellence in Writing Award of the American Bar Association’s Probate and Property Section and also the Ernst & Young Distinguished Estate Planner of the Year by the Montgomery County Estate Planning Council and as Distinguished Estate Planner by the Philadelphia Estate Planning Council. He is also recipient of the President’s Cup of the Philadelphia Life Underwriters, a two time Boris Todorsovich Lecturer, and the First Ben Feldman Lecturer.

A. STEPHEN MCDANIEL, JD, AEP, EPLS
A. Stephen McDaniel, JD, AEP, EPLS has been associated with the Tennessee firm of Williams, McDaniel, Wolfe & Womack, P.C. since 1975 and currently serves as Managing Partner. Mr. McDaniel specializes in estate planning for individuals, planning for business owners and probate of estates. He has served as an adjunct faculty member at the University of Memphis, Uccio C. Humphreys Chair of Taxation, a Beneficiaries of Law, teaching estate planning and estate and gift taxation. Mr. McDaniel has written articles for several publications, including the Journal of the American Society of CLU, Broker World, Life Association News and has been quoted in Kiplinger’s Personal Finance magazine and USA Today. Steve is Past President of the NAEPIC.

ALLYSON MCDONALD
Allyson MCDONALD is Vice President at Fidelity Charitable Services®. Fidelity Charitable Services® is a leading provider of administrative and other services to charitable organizations, such as private foundations and the Fidelity Charitable Gift Fund® (“Gift Fund”), a donor-advised fund and one of the nation’s leading independent public charities. As vice president and national sales manager, Allyson oversees a group of planned giving consultants and associates who increase awareness and educate advisors, high net-worth individuals and corporations on charitable giving solutions including the Gift Fund, Pooled Income Fund and Fidelity Private Foundations Services®. With over ten years in the financial services industry, Allyson speaks frequently on planned giving.

LOUIS A. MEZZULLO
Mr. Mezzullo is Partner at the Richmond, VA firm of McGuire Woods. His practice areas include private wealth services, trusts and estates, executive compensation, charitable giving, and employee benefits. His 28-year career in teaching, research, university administration, and non-profit work has prepared him for his current role as Partner in the Richmond, VA firm of McGuire Woods. He also has published selected chapters in various editions of the New York University Tax Institute, the University of Southern California Tax Institute, and the University of Miami Estate Planning Institute, along with an extensive array of articles on estate planning. He is an Advisor to the American Law Institute Restatement (Third) of Property — Willis and Other Donative Transfers.

JEFFREY N. PENNELL
Jeffrey N. Pennell teaches income tax, wealth transfer tax, trusts and estates, and estate planning. He practiced for several years in Chicago before beginning his teaching career at the University of Oklahoma in 1978. Professor Pennell has taught as a visiting professor at the law schools of Southern Methodist University and the Universities of Miami, North Carolina, and Texas. He has published classroom texts on the Income Taxation of Trusts, Estates, Grants, and Beneficiaries, a second on Federal Wealth Transfer Taxation, and a third on Estate Planning. He authored the Bureau of National Affairs Tax Management portfolio on the Estate Tax, Mortal Deduction and co-authored the portfolio on Estate Tax Payment and Apporportionment, and a text on Trust and Estate Planning published by the American Bar Association. He is the successor author of the leading treatise on estate planning, currently written by the late Harvard Professor A. James Cramer. He also has published selected chapters in various editions of the New York University Tax Institute, the University of Southern California Tax Institute, and the University of Miami Estate Planning Institute, along with an extensive array of articles on estate planning. He is an Advisor to the American Law Institute Restatement (Third) of Property — Willis and Other Donative Transfers and is an Associate Reporter of its Restatement (Third) of Trusts. Professor Pennell is a Visiting Adjunct Professor in the University of Miami’s L.L.M. in Estate Planning degree program.

ARTHEA STAEGER REED, Ph.D.
Arthea is a Long-Term Care Specialist with the Adulise Group of Northwestern Mutual Financial Network. Her professional specialties include personal planning analysis, retirement planning, long term care insurance, charitable giving and employee benefits. Her 28-year career in teaching, research, university administration and authoring books in the fields of education and literature led her to her current position. She was the recipient of the Long-Term Care Leader Award by Northwestern Mutual Long Term Care in 2000, 2001 and 2002. Arthea was a Qualifying Member of the Million Dollar Round Table in 2001, Court of the Table in 2002 and top of the Table in 2003.

JOSHUA S. KURENSTEIN
Joshua S. Kurestein is a principal of the New York law firm of Katten Muchin Rosenman LLP. Joshua handles a wide variety of private client matters on a local, national, and international level, including personal and estate planning, the administration of estates and trusts, and contested Surrogate’s Court and tax proceedings for high net-worth individuals. As an Academician and Member of the Executive Council of the International Academy of Estates and Trusts Law (IAETL), a Fellow and Regent of the American College of Trusts and Estates Counsel (ACTEC), a Member of the U.K.-based Society of Trust and Estate Practitioners (STEP), and a Fellow on the New York Bar Foundation. Joshua is a frequent lecturer on these topics.

RICHARD L. N. WEAVER
Mr. Weaver is a senior member of Bernstein’s Wealth Management Group in New York. Prior to joining the firm, his 24-year career at Prudential Securities included heading the private wealth management effort and managing the EC Services and Strategies Group. Mr. Weaver has worked extensively with high net-worth clients and their professional advisors, especially in creating financial solutions for corporate executives. His industry experience includes customizing hedging and monetization strategies for restricted and non-restricted single-stock positions. Mr. Weaver earned a BS from the Fletcher School of the University of Pennsylvania and an MBA from New York University.

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