Continuing education credit will be requested nationwide for attorneys, insurance professionals, accountants, and CFP®, CTFA and PACE designees. Up to 15 hours of credit may be available!*  
16.5 hours of Accredited Estate Planner® designation credit is available!  
*See general information page for details. Insurance professionals must attend the entire conference as partial credit is not available.
MONDAY, NOVEMBER 18, 2013

11:00 AM – 12:00 PM
Breakout Sessions

12:00 PM – 1:00 PM
Lunch

1:00 PM – 3:00 PM
Breakout Sessions

3:00 PM – 5:00 PM
Breakout Sessions

5:00 PM – 7:00 PM
Reception

THURSDAY, NOVEMBER 21, 2013

11:00 AM – 1:00 PM
Breakout Sessions

1:00 PM – 3:00 PM
Breakout Sessions

3:00 PM – 5:00 PM
Breakout Sessions

5:00 PM – 7:00 PM
Reception

FRIDAY, NOVEMBER 22, 2013

11:00 AM – 1:00 PM
Breakout Sessions

1:00 PM – 3:00 PM
Breakout Sessions

3:00 PM – 5:00 PM
Breakout Sessions

5:00 PM – 7:00 PM
Reception

SATURDAY, NOVEMBER 23, 2013

11:00 AM – 1:00 PM
Breakout Sessions

1:00 PM – 3:00 PM
Breakout Sessions

3:00 PM – 5:00 PM
Breakout Sessions

5:00 PM – 7:00 PM
Reception

SUNDAY, NOVEMBER 24, 2013

11:00 AM – 1:00 PM
Breakout Sessions

1:00 PM – 3:00 PM
Breakout Sessions

3:00 PM – 5:00 PM
Breakout Sessions

5:00 PM – 7:00 PM
Reception

PRESENTERS

VINCENT R. DIADONI (CMT®)

Vincenzo R. Diadoni is a senior associate with Stroock with 50 years of experience creating financial planning, estate and wealth management strategies for ultra-high net worth individuals and families and high-net-worth trusts. He is also a regular contributor to the Wall Street Journal, Forbes and other national media. Diadoni is a former president of the NAEPC and the New York Estate Planning Council. He is a frequent speaker at national and local seminars on estate planning and charitable giving, particularly in the areas of charitable remainder trust, charitable lead trust and charitable gift annuity. He has served on the board of directors of the New York City Bar Foundation and the New York Estate Planning Council.

SANDRA L. DONALDSON (J.D., LL.M., AEP®) (DISTINGUISHED)

Sandra L. Donaldson is a partner with Gardiner, Donaldson, Berg & Wadleigh in Nashville, Tennessee. Prior to joining the Florida State University College of Law in 2008, Sandra was the Milton and Betty Siegel Professor of Law at the University of Miami. Sandra was a visiting professor of law at the University of Washington, a law school she graduated from the law school of The University of Washington. She was a visiting professor of law at The University of Miami School of Law. She has been a member of the American Bar Foundation and the National Academy of Fellow College of Law. She has been the executive director of the Florida State University College of Law. From 2008 until 2010, she was the president of the American Bar Association. Sandra is the author of over 100 publications and articles and her work has been included in most law school casebooks in estate planning, trust and tax law.

KIRK D. HOWE, CFA, LL.M., AEP®, F.T. (DISTINGUISHED), REPC®

Kirk D. Howe is the Chief Global Wealth Advisor of BMO Harris Bank, a subsidiary of Bank of Montreal, and serves as the co-Chief Investment Officer and Co-Chief Strategist for the Global Wealth Management Group. He is also the co-Chief Investment Officer of BMO Private Banking. A co-founder of BMO Private Banking and a member of its Management Executive Committee, Mr. Howe has served as the Chief Investment Officer for the private client advisors group of Deloitte Tax LLP. Kirk is an adjunct professor of law at Georgetown University Law Center. Mr. Howe is a frequent speaker and author of numerous articles and presentations on wealth management, estate planning and related tax topics. He is a graduate of the University of Denver and holds a B.A. in Economics from the University of Colorado at Boulder. He is a native of Denver, Colorado and a former honors student in finance and economics at the University of Colorado. He has been quoted in numerous publications, including The New York Times, The Washington Post and The Wall Street Journal. He is an active member of NAEPC, where he serves on the board of directors of the NAEPC Florida Chapter and as the chair of the NAEPC Florida Chapter’s Board of Governors. Prior to joining Deloitte Tax, Mr. Howe was the leading estate planning and retirement income strategist for Northern Trust Wealth Management, a division of Northern Trust Corporation, and a former president of the national Board of Directors for NAEPC. He is also a member of the Board of Directors of the NAEPC Louisiana Chapter. Mr. Howe is a fellow of the Society of Trusts and Estates Counsel and is a graduate of the University of Denver law school. He is a member of the Planning Council of the National Association of Charitable Gift Planners. He is a member of the Planning Council of the National Association of Charitable Gift Planners. He is a member of the Board of Directors of the American College. He has served as a member of the Board of Directors of the NAEPC National Board of Directors and as the chair of the NAEPC National Board of Directors. He is a co-founder of the American College of Trusts and Estates Counsel. He is a member of the American College of Trust and Estates Counsel. He is a member of the American College of Trust and Estates Counsel. He is a member of the American College of Trust and Estates Counsel. He is a member of the American College of Trust and Estates Counsel.
EDUCATIONAL PROGRAM

WEDNESDAY, NOVEMBER 20, 2013

09:00 am  Welcome and Registration

09:30 am  Opening Remarks — Nancy B. Rapoport, JD

09:35 am  The Risk of Traditional Trusts and How to Proceed or Avoid Them — Paul S. Lee, JD, LL.M.

10:20 am  NAEPC Annual Conference — Session 1

12:00 noon  Lunch (on your own)

12:45 pm  Gifts in Trust — Steven J. Oshins, JD, AEP® (DISTINGUISHED)

1:30 pm  Why We Talk to Clients About Their Trusts — creek Leimberg, LeClair, Inc.

2:15 pm  Welcome Reception for all attendees and registered companions

2:20 pm  TECHNICAL EDUCATION SESSION INFORMATION

2:20 pm  This session will consider marital deduction, credit shelter, and portability planning for married couples — Jeffrey N. Pennell, JD

Thursday, November 21, 2013 sessions continued on next page…

PRESENTERS

BERNARD A. KROOKS, JD, CH. FL. ULP, UL. AEP®

BERNARD A. KROOKS is a founding partner of the firm of Krooks, Biran, Zarlenga & Price in Las Vegas, Nevada. He has served as a registered representative, insurance producer, and financial advisor. In 1998, he assumed the role of President and CEO of Life Settlements Institute, Inc., the national association for the life settlement industry. He has attended and chaired seminars at the American College of Trust and Estate Counsel and has served as a Trustee for the University of Nebraska College of Law. He received his law degree from the University of Connecticut.

BERNARD A. KROOKS has presented tax and legal seminars for the National Association of Elected Personal Financial Planners (NAEPFP) in Virginia, New York, and New Jersey, as well as several other states. He has been a featured speaker at the American College of Trust and Estate Counsel and at Trusts and Estates Bar Association meetings. He has served as a Trustee for the University of Nebraska College of Law. He received his law degree from the University of Connecticut.

STEVEN J. OSHINS, JD, CAN. RTR®, AEP® (DISTINGUISHED)

STEVEN J. OSHINS is the president and CEO of Life Settlements Institute, Inc., the national association for the life settlement industry. He received his law degree from the University of Nebraska College of Law in 1984, where he was notes and comments editor of the Nebraska Law Review. Since 2000, Mr. Oshins has served as the president of Life Settlements Institute, Inc., the national association for the life settlement industry, and as the CEO of Life Settlements Partners, Inc., an insurance company that invests in life settlement policies. He has also served as the chair of the Board of Directors of the Life Settlements Business Group and the editor of its newsletter, The Life Settlements Report.

NANCY B. RAPOPORT, JD

NANCY B. RAPOPORT is a partner at National Law Group in New York. She has served as the chair of the litigation and arbitration committee of the ABA section of trusts and estates. She is also a member of the American College of Trust and Estate Counsel, the American College of Real Estate Lawyers, the American College of Trial Lawyers, and the American Bar Association. She has been named to The Best Lawyers in America, Super Lawyers, and the National Trial Lawyers Top 40 Under 40. She has written numerous articles and lectured extensively on numerous topics related to trusts and estates law.

PAUL S. LEE, JD, LL.M.

PAUL S. LEE is a founding partner of Littman Krooks LLP, chair of its elder law and special needs department, and a professor at the Touro College School of Law. He is the author of "Avoiding and Correcting Bad Trusts" and "A Portable Guide to the Portability Election." He is a national estate planning expert and has been named in The Best Lawyers in America, the Daily Journal's Top Estate Planning Attorney, and Nevada Lawyer's Estate Planning Attorney of the Year.

SHERRY LEE \n
SHERRY LEE is an estate planning attorney in Las Vegas, Nevada, and a member of the Nevada Bar. She received her law degree from the University of Idaho College of Law and has practiced law since 1991. She has served as president of the Nevada Bar Women's Forum and is currently serving as the vice president of the Nevada State Bar Elder Law Section. She has written numerous articles and lectures extensively on estate planning and is a frequent lecturer on investment planning and tax and estate planning.

PAUL S. LEE, JD, LL.M.

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LODGING INFORMATION

The Cosmopolitan of Las Vegas is a unique luxury resort & casino featuring anything else in Las Vegas. This original destination features residential-style living spaces with exclusive private terraces and breathtaking views. Dining options include an eclectic mix of fine-dining restaurants and full-service casino collection. Stylish design and art engaging cultural sensibilities, while a vibrant nightlife scene captivates spectators. Combine it all with an exctic mix of hand-selected boutiques, an unvilled Pool District, a 10,000 square-foot spa and health club, and the University of Dallas Spa & Hammam to redefine your Las Vegas experience.

A special block of rooms has been reserved for 90th Annual Conference attendees at The Cosmopolitan of Las Vegas. The NAEPC room rate is $199.00 (double occupancy, excluding applicable state and local taxes) and includes in-room internet service at no additional charge. Additional room options are available. Reservations should be made by Friday, October 25, 2013 to guarantee the guest rate.

To reserve, visit http://www.naepec.org or phone (855) 435-0005 and reference group code “NAEPI17".

TRANSPORTATION DISCOUNTS

RENTAL CAR — NAEPC has arranged for special discounts with Hertz for rentals in Las Vegas. To reserve, visit the “reservations” page of www.naepec.org and click the Hertz logo to make an online reservation. To reserve by phone, call 888-655-4288 and reference CV code GWHW0101 to obtain the discounted rate.

CANCELLATION POLICY

Any cancellation must be received in writing or via email to confer@naepec.org. A full refund will be granted if notice is received prior to September 30, 2013. A partial refund of $150.00 will be granted if notice is received on or before October 1, 2013 and October 31, 2013 will forfeit a $100 administrative fee. No refunds will be granted after October 31, 2013.

CONTINUING EDUCATION CREDIT INFORMATION

16.5 hours of Accredited Estate Planner® designation credit have been awarded for this program.

The following credit will be requested in all states: insurance, legal, accounting, CPA, CFP, and PA. The conference is scheduled for November 21 and November 22, 2013. Insurance professionals must attend the entire two days of technical instruction to receive credit. Partial credit is NOT available. Insurance, legal, and CFP license numbers are required in order to receive credit. Credit will also be available for Enrolled Agents.

The conference offers up to 15 hours of continuing education credit. Individual states determine the total number of credits awarded. Participants are able to monitor the status of their category at any time by visiting http://www.naepec.org/conferences and the status will be updated as credits are received beginning approximately two months prior to the conference.

The Society of Financial Service Professionals 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 Credit Providers. States boards of accountancy have final authority on the acceptance of individual courses of CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Credit Providers, 11630 King Street, Suite 500, North Springfield, VA 22150, (703) 357-5400.

This program is recommended for a total of 15 specialized knowledge & applications credits by the AICPA. The 90th Annual Conference is an advanced educational program. A CPA that devotes at least 15% of their practice to this area, or an area closely related to the level of knowledge provided by this program, is eligible to attend the program. After attending, participants will be able to identify and implement advanced financial advice services to meet the needs of clients that will improve professionalism and personal service to their clients.

Continuing education credit is administered by the Society of PSP.
**COMPANION PROGRAM**

**COMPANION REGISTRANT INFORMATION** – Companion conference registration fee includes all breakfasts, the Wednesday evening welcome reception, and the companion tours. Please note, educational sessions are not available to companions.

### WEDNESDAY, NOVEMBER 20, 2013

**THE COSMOPOLITAN OF LAS VEGAS FOOD TOUR & COOKING DEMONSTRATION – 12:30 PM – 3:30 PM**

Come “taste” a true behind the scenes look at the fabulous food and beverage operation at The Cosmopolitan of Las Vegas! Attendees will experience the award-winning Wicked Spoon Buffet, the 24-hour, 3,000 seat room service operation, and The Cosmopolitan’s $40 million dollar revenue-producing banquet kitchens, experiencing a taste at each stop along the way. Next stop, a cooking extravaganza at Jaleo! Attendees will roll up their sleeves for an interactive cooking demonstration with Jaleo’s chef. This on-property restaurant showcases the tradition of cooking paella, Spain’s native dish, over a wood fire – its unique paella kitchen is the first of its kind in America! This truly is the best show in town.

**COUNCIL LEADERSHIP DAY PROGRAM**

**WEDNESDAY, NOVEMBER 20, 2013**

**COUNCIL LEADERSHIP DAY** is designed to be a sharing session among leaders of NAEP-C affiliated local councils. The morning is dedicated to the National Association of Estate Planners & Councils and The NAEP Education Foundation annual business meetings and committee updates, while afternoon sessions are committed to leadership development. The attendee can expect to interact with fellow volunteer leaders, attend breakout sessions designed for idea sharing and growth, and learn about ongoing NAEP programs and services. Nearly 50% of affiliated local councils are represented by officers, administrators, and/or board members each year. Don’t miss the opportunity to share your council’s successes, learn how to conquer the struggles, and deliver valuable benefits to your members.

The National Association of Estate Planners & Councils and The NAEP Education Foundation Annual Meetings take place the morning of Wednesday, November 20, 2013 and are an excellent opportunity to learn about all of the exciting things happening at the national level of benefit to the affiliated local council and its membership.

**ALL ATTENDEES** for Council Leadership Day should attend as these sessions are a part of the program for local council leaders.

**THURSDAY, NOVEMBER 21, 2013**

**DAY TRIP TO HOOVER DAM & BOULDER CITY – 8:30 AM – 3:30 PM**

Built during the Great Depression, the Hoover Dam provided jobs for 21,000 men and answered a great need. Citizens wanted to irrigate low desert areas without the risk of flooding, and the United States government determined the Colorado River was the solution to the battle over water rights. The Hoover Dam was named after Herbert Hoover for his vital role in its construction, first as the United States Secretary of Commerce and then as the President of the United States of America.

A knowledgeable guide will prepare guests with a history-filled dialogue as they travel from the Las Vegas Strip to Boulder City, the location of the Hoover Dam. Upon arrival at the Dam, guests will begin the uphill trek to the site. Several stops are along the way, including a brief video introduction followed by a trip down 530 feet through the rock wall of the Black Canyon to view eight of the 17 generators. A stroll on the observation deck is essential, as it offers up the perfect panoramic views of the Hoover Dam, Colorado River, and Lake Mead. Guests can also see the Mike O’Callaghan-Pat Tillman Memorial Bridge, built to help alleviate the traffic caused by 15,000 people passing through each day. Additional stops on the tour will include the Winged Figures of the Republic, the spillways, and the intake towers. Participants will have an approximate one hour at the Hoover Dam to leisurely tour and learn about this masterful site.

Guests with then be transported to Boulder City for lunch and time to explore on their own before heading back to The Cosmopolitan of Las Vegas.

**FRIDAY, NOVEMBER 22, 2013**

**HISTORIC LAS VEGAS – 9:30 AM – 4:00 PM**

This tour offers a small taste of the rich history that Las Vegas has to share! The first stop on this tour is the Neon Boneyard, the Neon Museum was established as a nonprofit organization in 1996 to collect and exhibit neon signs, the classic Las Vegas art form. Its collection boasts over 150 donated and rescued signs with the core of the collection contained in the Neon Museum Boneyard, a rambling park approximately two acres in size. Featured signs date from the late 1930s through the early 90s and represent motels, local businesses, and celebrated casinos from throughout the Las Vegas Valley. The Boneyard is not electricity, the photographic collection offers a glimpse into the storied past of Las Vegas.

Next stop, the Mob Museum, the stage for the biggest mob hearing in history! The Mob Museum sits inside the historic former federal courthouse and U.S. Post Office, one of the few remaining historically significant buildings in Las Vegas, included on both the Nevada and National Registers of Historic Places. From 1950 to 1956, the Kefauver Committee hearings on organized crime were held in 18 cities around the United States. In Las Vegas, the hearings were conducted in the courtroom in this very building on November 19, 1950. The courtroom has been recreated to appear as it did back then, a true portal to a time when the Mob “ran the town.”

Guests will then be transferred to the world-famous Fremont Street in Downtown Las Vegas to learn about the early history of hotels and casinos in Las Vegas, as well as the growth and revitalization of Fremont Street over the years. Attendees will have time on their own to explore Fremont Street, grab a bite to eat, or gamble at the downtown tables.

The day will end with an optional ride on the New York, New York Roller Coaster! The roller coaster will lift you up 203 feet, drop you down 144 feet, and leave you coasting at 67 MPH. (Please indicate whether you will participate on the registration form.)

**COMPANION PROGRAM / COUNCIL LEADERSHIP DAY**
WEDNESDAY, NOVEMBER 20, 2013

THE COSMOPOLITAN OF LAS VEGAS FOOD TOUR & COOKING DEMONSTRATION – 12:30 PM – 3:30 PM

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BERNARD A. KROOKS, JD, CLU, FSA, AEP®

Bernard A. Krooks is a founding partner of the firm of Krooks, Brooks LLP. One of the most well-respected estate planning and wealth preservation attorneys in the country, he has shaped the industry from its infancy through his tireless dedication to teaching and advocating for the highest standards in the field.

Krooks was a founding member of the National Academy of Estate Planning Attorneys, the first estate planning law school, the National Association of Estate Planners & Councils (NAEP), the first estate planning software company, and the first comprehensive estate planning software company. He is the author of the first comprehensive book in the field, “Concepts of Life Insurance Planning,” which is in its 7th edition.

Krooks has been named to the Super Lawyers list in California and Nevada and has been named to the “Best Attorneys in America” list by the International Association of Who’s Who. He is a member of the Estate Planning Council of Southern California and the San Diego County Bar Association Tax Section. Krooks is a past president of the California Bar Association Tax Section and served on the board of trustees of the National Academy of Estate Planning Attorneys.

In 2005, Krooks and his wife, Julie, founded the nonprofit Children’s Health Care Foundation of San Diego with the mission of providing support for children’s health care services through innovative philanthropic strategies. Krooks is a frequent speaker at conferences, universities and barristers and has been interviewed by countless newspapers, magazines and television shows. Krooks is a frequent speaker at conferences, universities and barristers and has been interviewed by countless newspapers, magazines and television shows.

Krooks is a venture capital investor in the FinTech industry. He is the founder of the National Academy of Estate Planning Attorneys, a member of the Board of Directors of the Academy of Family Wealth Planning Counsel, and a member of the Board of Directors of the National Association of Estate Planners & Councils.

In 2013, Krooks was named to the list of the 24 “Elite Estate Planning Attorneys in America” by the magazine Estate Planning. Krooks has been named to the list of the “100 Most Influential People” by the magazine WealthManagement.com and the list of the “100 Most Influential People” by the magazine WealthPlanners.com.

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Krooks is the author of over 20 books on estate planning and has written over 500 articles on the topic. Krooks is a frequent speaker at conferences, universities and barristers and has been interviewed by countless newspapers, magazines and television shows.

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Breakout Sessions

Cleveland, OH 44114

Please review “General Information” tab for details.

PROFESSIONAL DESIGNATIONS

❑ NICKNAME FOR NAMETAG PURPOSES (no charge)

❑ 2-day Companion Registration Package

❑ Conference Educational Package

❑ Council Leadership Day Package

❑ 3-day Companion Registration Package

❑ Conference Educational Packages

❑ 2-day Companion Registration Package

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❑ 2-...
Continuing education credit will be requested nationwide for attorneys, insurance professionals, accountants, and CFP®, CTFA and PACE designees. Up to 15 hours of credit may be available*!

16.5 hours of Accredited Estate Planner® designation credit is available!

*See general information page for details. Insurance professionals must attend the entire conference as partial credit is not available.