

National Association of Estate Planners & Councils
and The NAEPC Education Foundation

50th Annual Conference

November 20 – 22, 2013

Las Vegas, Nevada • The Cosmopolitan of Las Vegas



November 20, 2013

Sessions begin at 7:30 am

Council Leadership Day

This day of activities is designed as a leadership sharing session for volunteers at the affiliated local council level, including updates on benefits, programs, and services available to affiliated local councils. Additional sessions are devoted to private, volunteer-led discussion groups for leaders from councils of like-size. The NAEPC webmaster will also be on hand to discuss the website platforms offered to councils through NAEPC. The day concludes with the conference welcome reception for all registered attendees and companions.

Companion Program

The Cosmopolitan of Las Vegas
Food Tour & Cooking Class

Continuing education credit will be available nationwide for estate planning-related disciplines to those who attend the Thursday & Friday technical education sessions (pending approval by governing bodies).

Life insurance professionals must attend the entire conference to receive credit as partial credit is not available.

November 21, 2013

Sessions begin at 7:00 am with

Sponsor Bonus Sessions (see www.naepc.org)

5:45 am 5th Annual
Fun Run & Walk

Technical Education Day 1

Jeffrey N. Pennell, JD
Current Developments

Samuel A. Donaldson, JD, LL.M., AEP®
(Distinguished)
A Portable Guide to the Portability Election

Paul S. Lee, JD, LL.M.
Family Investment Partnerships: Structure, Design, Issues & Problems (Beyond the Valuation Discount)

Nancy B. Rapoport
Social Science, Human Error & Behavior

David A. Handler, JD, AEP® (Distinguished)
Structuring Trusts or Trust Design Strategies

Breakout Option 1: David A. Handler, JD, AEP® (Distinguished), Stephan R. Leimberg, JD, AEP® (Distinguished), and Richard A.

Oshins, JD, LL.M., MBA, AEP® (Distinguished)
How to Get Your Clients to Proceed with Their Planning

Breakout Option 2: Christopher R. Hoyt, JD, AEP® (Distinguished)
So You Want to Be a Philanthropist?

Breakout Option 3: Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP®
Special Needs Trusts: What Every Estate Planning Professional Needs to Know

Private Session for Active Accredited Estate Planner® Designees Only presented by Stephan R. Leimberg, JD, AEP® (Distinguished)
Six Magic Steps to Power Marketing

Companion Program

Day Trip to Hoover Dam & Boulder City

November 22, 2013

Sessions begin at 7:00 am with

Sponsor Bonus Sessions (see www.naepc.org)

Technical Education Day 2

David H. Kirk
Section 1411 - The Tax Version of the Twilight Zone

Carlyn McCaffrey, LL.B., LL.M., AEP®
(Distinguished)
Using Defined Value Clauses to Reduce Gift Tax Valuation Risk

Steven J. Oshins, JD, AEP® (Distinguished)
Hybrid DAPT

John W. Porter, B.B.A., JD, AEP®
(Distinguished)
Current Issues Involving FLPs, LLCs, and Other Closely Held Entities

Robert S. Keebler, CPA, MST, AEP® (Distinguished)
Innovative Income Tax Planning Strategies for Estate Planners

Breakout Option 1: Vincent M. D'Addona, CLU®, ChFC®, AEP®, Robert S. Keebler, CPA, MST, AEP® (Distinguished), and Steven J. Oshins, JD, AEP® (Distinguished)
Choice of Wealth Shifting Strategies

Breakout Option 2: Albert E. Gibbons, CLU®, ChFC®, AEP® (Distinguished) Nominee, Michael W. Halloran, CLU®, ChFC®, AEP®, CFP®, REBC, RHU, LUTCF, MSFS, MSM, and Robert C. Slane, CLU®, AEP®
Let's Get Ready to Rumble: Fundamentals of Life Insurance

Breakout Option 3: Jeremiah W. Doyle IV, JD, LL.M. (taxation), LL.M. (banking law), AEP® (Distinguished)
Estate Planning for Divorces

Companion Program

Historic Las Vegas Tour, including an opportunity to experience the Fremont Street Zipline Adventure

Lodging Information

A special block of rooms has been reserved for 50th Annual Conference attendees at the hosting property, **The Cosmopolitan of Las Vegas**. The NAEPC room rate is \$179 (single/double occupancy, exclusive of applicable state and local taxes) and includes in-room internet service at no additional charge. Additional room options are available. Reservations must be made by Friday, October 25, 2013 to guarantee the group rate.

To reserve online, visit www.naepc.org/conference. Reservations may also be made by calling 855-435-0005 and referencing group code "SNAEP3".

Transportation Information

RENTAL CAR

NAEPC has arranged for special discounts with Hertz for car rentals in Las Vegas from 11/13/13 – 11/29/13.

Visit www.naepc.org to make your reservation or call (800) 654-2240 and reference CV#03WB0010 to obtain the discount.

Cancellation Policy

Any cancellation must be received in writing or via e-mail to conference@naepc.org. A full refund will be granted if notice is received on or before 09/30/13. Registrants who cancel between 10/01/13 and 10/31/13 will forfeit a \$100 administrative fee. No refunds will be granted on or after 11/01/13.

Continuing Education Credit

Continuing education credit will be available nationwide for estate planning-related disciplines to those who attend the Thursday & Friday technical education sessions (*pending approval by governing bodies*). Life insurance professionals must attend the entire conference to receive credit as partial credit is not available.



Last Name	First Name & Middle Initial
Professional Designations	Nickname for Nametag Purposes
Company Name	Street Address
City, State & Zip	Telephone Number
Email Address	Fax Number
Affiliated Local Council Membership	
Companion Last Name, First Name, and Nickname for Nametag Purposes	
Companion Street Address, City, State & Zip Code	
Companion Telephone Number	Companion Email Address

REGISTRANT DISCOUNTS

- \$50 Early Bird Discount (registration must be received by September 30, 2013)
- \$50 Active Accredited Estate Planner® designee
- \$50 Host Council Discount for Members of Southern Nevada EPC
- \$100 NAEPC Volunteer Discount (available to non-board members of any committee of NAEPC)
- \$350 NAEPC Past Service Discount (available to past conference chairman, both local and national, and past board members of NAEPC) *Please note, this discount cannot be combined with other discounts.*

	Member	Non-Member
Council Leadership Day Package	\$850	N/A
Includes Council Leadership Day sessions and technical education sessions, presentation material, conference breakfasts & luncheons & the Wednesday evening welcome reception.		
<input type="checkbox"/> I will attend the welcome reception on Wednesday, November 20, 2013		
<input type="checkbox"/> I will participate in the fun run on Thursday, November 21, 2013 at 5:45 am		
<input type="checkbox"/> I am an active AEP® and will participate in the private session on Thursday, November 21, 2013		
<input type="checkbox"/> My breakout choice is: _____ Thursday / _____ Friday		
<input type="checkbox"/> I have read and understand both the continuing education credit and cancellation policies (left panel).		

	\$750	\$850
Conference Educational Package		
Includes the Wednesday evening welcome reception, technical education sessions, presentation material & conference breakfasts & luncheons.		
<input type="checkbox"/> I will attend the welcome reception on Wednesday, November 20, 2013		
<input type="checkbox"/> I will participate in the fun run on Thursday, November 21, 2013 at 5:45 am		
<input type="checkbox"/> I am an active AEP® and will participate in the private session on Thursday, November 21, 2013		
<input type="checkbox"/> My breakout choice is: _____ Thursday / _____ Friday		
<input type="checkbox"/> I have read and understand both the continuing education credit and cancellation policies (left panel).		

	\$450
3-day Companion Registration Package	
Includes conference breakfasts, the Wednesday – Friday companion tours & Wednesday welcome reception.	
<input type="checkbox"/> I will attend the companion tour on Wednesday, November 20, 2013	
<input type="checkbox"/> I will attend the welcome reception on Wednesday, November 20, 2013	
<input type="checkbox"/> I will participate in the fun run on Thursday, November 21, 2013 at 5:45 am	
<input type="checkbox"/> I will attend the companion tour on Thursday, November 21, 2013	
<input type="checkbox"/> I will attend the companion tour on Friday, November 22, 2013 (Zipline ___ Yes / ___ No)	

	\$400
2-Day Companion Registration Package	
Includes conference breakfasts, the Thursday – Friday companion tours & Wednesday welcome reception.	
<input type="checkbox"/> I will attend the welcome reception on Wednesday, November 20, 2013	
<input type="checkbox"/> I will participate in the fun run on Thursday, November 21, 2013 at 5:45 am	
<input type="checkbox"/> I will attend the companion tour on Thursday, November 21, 2013	
<input type="checkbox"/> I will attend the companion tour on Friday, November 22, 2013 (Zipline ___ Yes / ___ No)	

Fee Computation & Payment Instructions

Primary Registrant Fee	_____
Less discount(s)	_____
Companion Registrant Fee	_____
Subtotal	_____
Add \$50 late fee if postmarked on or after 10/18/13 - TOTAL	_____

Make check payable to "The NAEPC Education Foundation" and mail to address at the top of the page, register online at www.naepc.org or fax this page with credit card information to (216) 696-2582.

Account Number	Exp. Date
Signature	