

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

# 51<sup>st</sup> Annual Conference

November 5 – 7, 2014

San Antonio, Texas • Marriott Rivercenter



## November 5, 2014

Sessions begin at 7:30 am

### Council Leadership Day

This day of activities is designed as a leadership sharing session for estate planning council board members and staff, including updates on benefits, programs, and services available to all affiliates. Additional sessions are devoted to private, volunteer-led discussion groups for leaders from councils of like-size. The NAEPC webmaster will also be available 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 ★**

A Taste of Tuscany at  
Sandy Oaks Olive Orchard

### **\*Estate Planning Hall of Fame®**

#### *2014 Entrants*

Alexander A. Bove, Jr., JD, LL.M.,  
Solicitor, England & Wales

Arthur J. Dixon, CPA,  
JD, LL.M. (taxation)  
(posthumous)

Bernard A. Krooks, JD, CPA,  
LL.M., CELA

Paul S. Lee, JD, LL.M.

Lee J. Slavutin, MD, CLU®

John A. Wallace, JD

Randy L. Zipse, JD, CPA

## November 6, 2014

5:45 am ★ 6<sup>th</sup> Annual Fun Run & Walk

Sessions begin at 7:00 am with  
Sponsor Bonus Sessions (see [www.naepc.org](http://www.naepc.org))

### Technical Education Day 1

Robert S. Keebler, CPA, MST,  
AEP® (Distinguished)  
*15 Best Planning Ideas for  
2014 and Beyond*

Todd A. Fithian  
*The True Frontier of Estate Planning:  
Effective Collaboration*

Bernard A. Krooks, JD, CPA, LL.M.,  
CELA, AEP® (Distinguished) Nominee\*  
*Planning for an Aging Population: Your  
Clients, Your Parents, and Someday You!*

### **Repeated Breakout Sessions (offered twice)**

**Option 1:** Susan T. Bart, JD  
*Decanting: Refining a Vintage Trust*

**Option 2:** Elizabeth L. Morgan, JD  
*Life Insurance, Annuities, and Captive  
Insurance as Tools for Domestic and  
International Planning*

**Option 3:** Thomas Rogerson  
*Family Governance is the New Normal in  
Service to High-Net-Worth Families.  
Are You Normal?*

Samuel A. Donaldson, JD, LL.M.,  
AEP® Distinguished  
*Hot Income Tax Tips for Estate Planners*

Special Private Educational Session for  
Active Accredited Estate Planners®

### **Companion Program ★**

Fly Fishing on the Guadalupe

## November 7, 2014

Sessions begin at 7:00 am with  
Sponsor Bonus Sessions (see [www.naepc.org](http://www.naepc.org))

### Technical Education Day 2

Annual Awards Ceremony &  
Estate Planning Hall of Fame®  
Induction Ceremony\*

Jeffrey N. Pennell, JD  
*Annual Update*

Lee J. Slavutin, MD, CLU®,  
AEP® (Distinguished) Nominee\*  
*Tax Traps  
Involving Life Insurance*

Jerome M. Hesch, JD,  
AEP® (Distinguished)  
*Reality of Sale: Dealing with the 10%  
Myth for Seeding Installment Note  
Sales to IDGTs and BDITs*

Jonathan G. Blattmachr, Esq.,  
AEP® (Distinguished)  
*Supercharged Shelter Credit Trust<sup>SM</sup> vs.  
Portability: It's Not that Complicated  
to Choose the Best*

S. Stacy Eastland, JD,  
AEP® (Distinguished)  
*Some of the Best Charitable Planning  
and Estate Planning Ideas We See Out  
There in the New 2014 Tax  
Environment©*

Stanley M. Johanson, JD, LL.M.,  
AEP® (Distinguished)  
*Recent Developments Affecting the  
Estate Planning Practice*

### **Companion Program ★**

Caves and Gems Tour at  
National Bridge Caverns

*Please note, companion programs and schedule subject to change.*

**Lodging Information ★**

A special block of rooms has been reserved for 51<sup>st</sup> Annual Conference attendees at the hosting property, **Marriott Rivercenter**. The NAEPC room rate is \$199 (single/double occupancy, exclusive of applicable state and local taxes) and includes wired and wireless in-room internet service at no additional charge.

Reservations must be made by Friday, October 17, 2014 to guarantee the group rate. To reserve online, visit [www.naepc.org/conference](http://www.naepc.org/conference). Reservations may also be made by calling (800) 648-4462 (please inform the reservationist you are with NAEPC.)

**Transportation Information ★**

**Rental Car**

NAEPC has arranged for special discounts with Hertz for car rentals in San Antonio from 10/30/14 – 11/14/14.

Visit [www.naepc.org](http://www.naepc.org) to make your reservation or call (800) 654-2240 and reference CV#03WB0012 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 09/19/14. Registrants who cancel between 9/20/14 and 10/17/14 will forfeit a \$100 administrative fee. No refunds will be granted on or after 10/18/14.

**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.**



[www.NAEPc.org](http://www.NAEPc.org)  
 (866) 226-2224

_____	_____
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 12, 2014)
- ★ \$50 Active Accredited Estate Planner<sup>®</sup> designee
- ★ \$50 Host Council Discount for Members of San Antonio Estate Planners Council
- ★ \$100 NAEPC Volunteer Discount (available to non-board members of any committee of NAEPC)

	<b>Member**</b>	<b>Non-Member</b>
<b><u>Council Leadership Day Package</u></b>	<b>\$900</b>	<b>N/A</b>

Includes Council Leadership Day sessions and technical education sessions, presentation material, conference breakfasts & luncheons & the Wednesday evening welcome reception.

- I will attend the welcome reception on Wednesday, November 5, 2014
- I will participate in the fun run on Thursday, November 6, 2014 at 5:45 am
- I am an active AEP<sup>®</sup> and will participate in the private session on Thursday, November 6, 2014
- My Thursday breakout choices are Option \_\_\_\_\_ (first session), Option \_\_\_\_\_ (second session)
- I have read and understand both the continuing education credit and cancellation policies (left panel).

	<b>\$800</b>	<b>\$950</b>
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**Conference Educational Package**

Includes the Wednesday evening welcome reception, technical education sessions, presentation material & conference breakfasts & luncheons.

- I will attend the welcome reception on Wednesday, November 5, 2014
- I will participate in the fun run on Thursday, November 6, 2014 at 5:45 am
- I am an active AEP<sup>®</sup> and will participate in the private session on Thursday, November 6, 2014
- My Thursday breakout choices are Option \_\_\_\_\_ (first session), Option \_\_\_\_\_ (second session)
- I have read and understand both the continuing education credit and cancellation policies (left panel).

	<b>\$475</b>
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**3-Day Companion Registration Package**

Includes conference breakfasts, the Wednesday – Friday companion tours & Wednesday welcome reception.

- I will attend the companion tour on Wednesday, November 5, 2014
- I will attend the welcome reception on Wednesday, November 5, 2014
- I will participate in the fun run on Thursday, November 6, 2014 at 5:45 am
- I will attend the companion tour on Thursday, November 6, 2014
- I will attend the companion tour on Friday, November 7, 2014

	<b>\$425</b>
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**2-Day Companion Registration Package**

Includes conference breakfasts, the Thursday – Friday companion tours & Wednesday welcome reception.

- I will attend the welcome reception on Wednesday, November 5, 2014
- I will participate in the fun run on Thursday, November 6, 2014 at 5:45 am
- I will attend the companion tour on Thursday, November 6, 2014
- I will attend the companion tour on Friday, November 7, 2014

**Fee Computation & Payment Instructions**

Primary Registrant Fee	_____
Less discount(s)	_____
Companion Registrant Fee	_____
Subtotal	_____
Add \$50 late fee if postmarked on or after 10/17/14 - TOTAL	_____

\*\*A member is defined as an active AEP<sup>®</sup> designee or a member of an affiliated local estate planning council.

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

_____	_____
Account Number	Exp. Date
_____	
Signature	