



NAEPC & The NAEPC Education Foundation
1120 Chester Ave., Suite 470
Cleveland, OH 44114

51st Annual Conference
November 5-7, 2014

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National Association of Estate Planners & Councils



The NAEPC Education Foundation

51st ANNUAL
CONFERENCE



NOVEMBER 5-
NOVEMBER 7
2014
San Antonio, TX

CONTINUING EDUCATION

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.

51st Annual Conference
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The Multi-Disciplinary Approach to Estate Planning

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 5, 2014

A DAY IN THE LIFE OF SANDY OAKS OLIVE ORCHARD 9:00 am - 2:30 pm

Attendees will explore one of the first commercial olive orchards in Texas, Sandy Oaks Orchards, during this tour. While best known for the olive trees, olive oil, and the various olive oil and olive leaf-based skin care products it produces, Sandy Oaks is also celebrated for its emphasis on hospitality and educating the public on the benefits and various uses of olive oil.

Participants will tour the orchard, learn about the benefits of olive oil and get a sneak peek at the skin care line, and enjoy lunch with Chef Chris Cook, all with Sandy Oaks pioneer, owner, and operator, Sandra “Sandy” Winokur. Sandy will share her unique story and answer your questions along the way.

THURSDAY, NOVEMBER 6, 2014

FLY FISHING ON THE GUADALUPE 8:00 am - 5:00 pm

C'mon... give fly fishing a try!

Upon arrival at the Guadalupe River, participants will be met by a professional angler with over twenty years' experience leading expeditions in Texas, Colorado, and the Pacific Northwest. The excursion includes instruction, state of the art equipment, and is appropriate for the very beginner to a seasoned angler.



The stunning Guadalupe River is shaded by 100 foot tall cyprus and pecan trees and flanked by 500 foot limestone cliffs at some points. There are light, white water rapids and long, deep pools that hold largemouth and small mouth bass as well as trophy trout.

This is an outdoor activity and attendees should come prepared with comfortable clothing that is able to get wet, sneakers or water shoes, a hat, sunscreen, and sunglasses. A fishing license is required to participate. Instructions to obtain this license will be emailed in advance of the program.



FRIDAY, NOVEMBER 7, 2014

CAVES & GEMS TOUR AT NATURAL BRIDGE CAVERNS 9:00 am - 3:00 pm

Natural Bridge Caverns is much more than one of the most treasured natural attractions Texas has to offer! Except for the lighting, walkways and handrails, attendees will find the half-mile caves, 180 feet below-ground, much the same as the discoverers did in 1960. The caves are an awe-inspiring, ancient world of towering formations, created at an average rate of only one cubic inch every one hundred years.

Guests will be treated to lunch mid-day.

Whether you are a first timer or an avid caver, Natural Bridge Caverns awaits you with an experience that you won't soon forget.

This tour involves rigorous walking in high humidity. Please wear comfortable walking shoes that provide good traction on steep, wet surfaces.

**Companion tours and timing subject to change.*

COUNCIL LEADERSHIP DAY PROGRAM

WEDNESDAY, NOVEMBER 5, 2014

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 and The NAEPC Education Foundation annual business meetings and committee updates, while afternoon sessions are devoted 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 NAEPC 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 mitigate the struggles, and deliver valuable benefits to your members.



SPECIAL NOTE

The National Association of Estate Planners & Councils and The NAEPC Education Foundation Annual Meetings take place the morning of Wednesday, November 5, 2014 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.

COUNCIL LEADERSHIP DAY SCHEDULE

7:30 am - 8:30 am

Breakfast

12:00 pm - 1:00 pm

Lunch

8:30 am - 12:00 pm

NAEPC & The NAEPC Education Foundation Annual Meetings (Council leaders should attend this portion of the program.)

Informational Updates - Review of Benefits, Programs & Services Available to Councils and Council Members

1:00 pm - 5:00 pm

Council Leadership Sharing Sessions
Administrator/Paid Staff Included

5:00 pm - 7:00 pm

Welcome Reception for All Attendees and Registered Companions



SPECIAL NOTE for ADMINISTRATORS

Council Administrators / Paid Staff are encouraged to attend the sessions, both the Annual Meeting and Council Leadership Sharing Sessions as noted above, on Wednesday, November 5, 2014. The annual Administrator's Dinner will take place on Wednesday, November 5, 2014 at a time and location to be determined.

Special private sessions will take place on Thursday, November 6, 2014 from 8:00 am – 12:00 pm just for Council Administrators / Paid Staff. Please make travel plans accordingly!

Estate Planning Law Specialist Review Course

Obtain the Estate Planning Law Specialist (EPLS) Certification at the 51st Annual Conference Wednesday, November 5, 2014 · 1:00 pm to 5:00 pm

Registration Fee Includes:

- Advance access to review materials
- Live review course
- Proctored exam
- Application fee for certification
- Welcome Reception with all 51st Annual Conference attendees following the exam

The review course will be offered by J. Randall Gardner, JD, LL.M., MBA, CPA, CFP®, a practicing attorney with over 30 years of experience and a professor of tax and financial planning. He is the former director of the Certificate in Financial Planning Program at the Henry W. Bloch School of Management. Gardner earned a BA degree, cum laude, from Harvard University. He earned his JD and MBA degrees from the University of Kansas, and his Master of Law in Taxation from the University of Missouri- Kansas City. He is also a graduate of Georgia State University's Master Teacher Program. Gardner is the coauthor of *101 Tax Saving Ideas, Tools and Techniques of Income Tax Planning* and *The Closing Wealth Transfer Window*. Also, he is a columnist/editor for *The Journal of Financial Planning*.

Registration Fee: Member of NAEPC-affiliated local estate planning council: \$595 / Non-member: \$645

For more information about the EPLS program, please visit www.naepc.org/designations/estate-law or contact the Estate Law Specialist Board office at 866-226-2224 or admin@naepc.org. To register, please email admin@naepc.org to obtain instructions.