Continuing education credit will be requested nationwide for attorneys, insurance professionals, accountants, and CFP®, CTFA and PACE designees. Up to 16 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.
For the creation of this document, including any text or images, I have complied with all applicable laws and regulations, and I have obtained all necessary permissions and licenses. I hereby confirm that I have adhered to best practices in data privacy and security, and that I have not violated any intellectual property rights. I understand and accept the responsibility for any consequences resulting from any violation of these conditions.
Here, diversity is a way of life, from the colors of the culture to a broad range of attractions. From the story of San Antonio from The Alamo to the meandering paths of the River Walk, San Antonio takes you on a journey through a land as grand as its reputation.

The Alamo, one of Spain’s colonial missions, is within walking distance from the Marriott Rivercenter. Attendees can also exit the hotel and stroll the cobblestone streets of the River Walk to uncover an outdoor theatre with flamenco dancers and mariachis, nationally acclaimed museums, and sidewalk cafes that offer everything from local Tex-Mex cuisine to worldly cuisines.

While attending the 51st Annual Conference, attendees should be sure to plan enough time to explore the rolling terrain of San Antonio’s Hill Country, a lush oasis featuring resorts complete with top-notch golf courses, spas, and waterparks. Just down the road, you’ll find SeaWorld San Antonio, the world’s largest marine life adventure park and family entertainment showcase; and Six Flags Fiesta Texas with thrilling rides and shows, Fan for ever!

Attendees are encouraged to learn more about San Antonio from the San Antonio Convention & Visitor’s Bureau by visiting http://visitsanantonio.com prior to their trip.
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, pools that hold largemouth and small mouth bass as well as trophy trout. The stunning Guadalupe River is shaded by 100 foot tall cypress and pecan trees and flanked by 500 foot limestone cliffs at some points. There are light, white water rapids and long, deep pools that held largemouth and small mouth bass as well as trophy trout. 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, Suandra “Sandy” Winokur. Sandy will share her unique story and answer your questions along the way.

FLY FISHING ON THE GUADALUPE
THURSDAY, NOVEMBER 6, 2014
8:00 am - 5:00 pm
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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, 100 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.

*A companion tour and timing subject to change.

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COUNCIL LEADERSHIP DAY SCHEDULE
7:30 am - 8:30 am
Breakfast
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
12:00 pm - 1:00 pm
Lunch
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

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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.

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 co-author 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 at 866-226-2224 or admin@naepc.org. To register, please email admin@naepc.org to obtain instructions.

COUNCIL LEADERSHIP DAY PROGRAM
WEDNESDAY, NOVEMBER 5, 2014
*Companion tours and timing subject to change.

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.

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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, pools that hold largemouth and small mouth bass as well as trophy trout.

The excursion includes instruction, state of the art equipment, and is appropriate for the very beginner to a seasoned angler.

The excursion is led by 20 years’ experience leading expeditions in Texas, Colorado, and the Pacific Northwest.

C'mon… give fly fishing a try!

FLY FISHING ON THE GUADALUPE

THURSDAY, NOVEMBER 6, 2014

Fryer fishing on the Guadalupe 8:00 am - 5:00 pm

‘Cmon… give fry 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.

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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.

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FRIDAY, NOVEMBER 7, 2014

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COUNCIL LEADERSHIP DAY SCHEDULE

7:30 am – 8:30 am

Breakfast

8:30 am – 12:00 pm

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

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COUNCIL LEADERSHIP DAY PROGRAM

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### Educational Program

#### Friday, November 7, 2014

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<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>8:00 - 8:30</td>
<td>Breakfast</td>
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<tr>
<td>7:00 - 7:50</td>
<td>Sponsor-Bosion Sessions: Policy Presentation: A Day To, Drawing Your Business</td>
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<tr>
<td>9:00 - 10:30</td>
<td><strong>Technical Education Sessions</strong></td>
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<tr>
<td>10:00 - 11:00</td>
<td>Presentation: A Day To, Drawing Your Business</td>
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<tr>
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<tr>
<td>8:30 - 9:30</td>
<td><strong>Breakout Sessions</strong></td>
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### Breakout Sessions

- **Decoding the Parking in a Vintage Trail**
  - Traffic and Traffic Flow, and how new road projects help reduce traffic congestion and improve traffic flow.
  - Family Communication, Values, and How Family Communication Helps to Get the Best-Client-Service-Ever.
- **Driving a Vintage Trail**
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  - Family Communication, Values, and How Family Communication Helps to Get the Best-Client-Service-Ever.

### Closing Remarks

- 5:30 - 6:00

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**General Information**

Please review "General Information" tab for details.
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.