The 52nd Annual Advanced Estate Planning Strategies Conference

52nd Annual Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders

Companion Program & Tours

The companion program is designed as an enhancement to the general conference for those who will be attending with a regular registration but not taking advantage of the educational sessions. The registration fee includes: 3-day hotel and tour, 2-day evening Welcome Reception, and, the suite of comprehensive descriptions of each tour can be found at www.naepc.org/conference.

3-Day Package $470 (including Thursday & Friday Tours)
2-Day Package $410 (Wednesday, Thursday & Friday Tours)

Companion Program:
- 11/15/2015 Welcome Toast
- 11/16/2015 Private Wealth Management
- 11/17/2015 Private Wealth Management
- 11/18/2015 Welcome Reception (5:00 pm)
- 11/19/2015 Pre-Conference Sessions for Council Leaders
- 11/20/2015 Estate Planning Law Specialist Live Review Course & Exam
- 11/20/2015 Private Wealth Management
- 11/21/2015 Private Wealth Management
- 11/22/2015 Private Wealth Management
- 11/23/2015 Private Wealth Management
- 11/24/2015 Private Wealth Management
- 11/25/2015 Private Wealth Management
- 11/26/2015 Private Wealth Management
- 11/27/2015 Private Wealth Management
- 11/28/2015 Private Wealth Management
- 11/29/2015 Private Wealth Management
- 11/30/2015 Private Wealth Management
- 12/01/2015 Private Wealth Management
- 12/02/2015 Private Wealth Management
- 12/03/2015 Private Wealth Management
- 12/04/2015 Private Wealth Management
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- 12/07/2015 Private Wealth Management
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- 12/27/2015 Private Wealth Management
- 12/28/2015 Private Wealth Management
- 12/29/2015 Private Wealth Management
- 12/30/2015 Private Wealth Management
- 12/31/2015 Private Wealth Management

2-Day Package $390 (includes Thursday & Friday Tours)
1-Day Package $320 (Wednesday, Thursday & Friday Tours)

Pre-Conference Session:
- 11/13/2015 Pre-Conference Sessions for Council Leaders
- 11/14/2015 Pre-Conference Sessions for Council Leaders

Estate Planning Law Specialist Live Review Course & Proctored Exam

In partnership with the 52nd Annual Advanced Estate Planning Strategies Conference, the Estate Law Specialist Board is excited to offer an in-person review course and proctored Estate Planning Law Specialist exam on November 19, 2015 from 12:30 pm – 5:00 pm. The fee is $25 for members of an estate planning council and $40 for a non-member.

Once registered for the proctored exam, candidates will be contacted by the Estate Law Specialist Board and provided with the application for certification, which must be completed and returned to the Estate Law Specialist Board by October 30, 2015. Registrations will be accepted until Friday, October 9, 2015. Exam results will be communicated within thirty (30) days. For more information, contact the Estate Planning Law Specialist Board office at (903)231-0201 or visit naepc.org/designations/estate-law/introduction.

Alexandria, Virginia
November 18-20, 2015

We are grateful for the support of the 52nd Annual Advanced Estate Planning Strategies Conference Sponsors, including

Lodging Information:
The conference will take place at the Omni Amelia Island Plantation Resort, located on the southern tip of Amelia Island, north of Jacksonville, Florida. For more information, visit www.ameliaisland.com. The conference will be held at the Omni Amelia Island Plantation resort, nestled at the tip of Amelia Island, Florida. For more information, visit www.ameliaisland.com.

Overnight accommodations can be arranged by calling (888) 261-6161 and booking at www.naepc.org/conference. The conference will be held at the Omni Amelia Island Plantation resort, nestled at the tip of Amelia Island, north of Jacksonville, Florida. For more information, visit www.ameliaisland.com. The conference will be held at the Omni Amelia Island Plantation resort, nestled at the tip of Amelia Island, north of Jacksonville, Florida. For more information, visit www.ameliaisland.com.

Transportation:
Transfers between the conference and shuttle service can be found at www.naepc.org/conference.

Regulator Discount:
All NAEPC-regulated, licensed attorneys/paid staff are eligible to attend the program at no charge.

National Association of Estate Planners & Councils
1120 Chester Ave., Ste. 470
Cleveland, OH 44114
(866) 226-2224
www.naepc.org
Wednesday, November 18, 2015

12:00 pm - 5:20 pm Estate Planning Law Specialist Certification Live Review Course & Exam
12:00 pm - 10:30 am "Break with Exhibitors"
6:30 pm - 8:30 pm Welcome Reception for All Conference Attendees

Thursday, November 19, 2015

7:00 am - 8:00 am Breakfast
8:00 am - 9:45 am Annual Business Meeting
9:45 am - 10:15 am 1st Annual Leonard H. Neiman & Walter Lee Davis, Jr. Award Ceremony & Reception
10:20 am - 10:50 am Break with Exhibitors
10:50 am - 11:50 am Improving (and/or Revisiting) Popular Estate Planning Strategies
11:50 am - 12:00 pm Break with Exhibitors
12:00 pm - 2:45 pm "Break with Exhibitors"
2:50 pm - 3:50 pm Life Insurance - Key Cases and Rulings of 2014-2015
3:50 pm - 4:05 pm Break
4:05 pm - 5:05 pm Session Provided by Care.com Homepay
5:05 pm - 6:05 pm Exit with Exhibitors
6:15 pm - 8:15 pm Estate Planning Law Specialist Certification Live Review Course & Exam
7:00 pm - 9:00 pm Welcome Reception for All Conference Attendees
8:15 am - 9:15 am Welcome & Opening Remarks
9:15 am - 9:45 am Annual Award & Estate Planning Hall of Fame® Induction Ceremony
10:15 am - 11:15 am Session Provided by Greenberg Traurig, LLP
11:15 am - 12:00 pm Break with Exhibitors
12:00 pm - 1:30 pm Sponsored Breakout Sessions (choose one on registration form)

Friday, November 20, 2015

7:00 am - 8:00 am Breakfast
8:00 am - 9:45 am Welcome & Opening Remarks
9:45 am - 10:15 am Welcome & Opening Remarks
10:15 am - 11:15 am By the Numbers: AEP® and EPLS Designees vs. The Rest of the Pack
11:15 am - 12:00 pm Lunch with Exhibitors
12:00 pm - 1:00 pm "Break with Exhibitors"
1:00 pm - 2:00 pm "Break with Exhibitors"
2:00 pm - 3:00 pm "Break with Exhibitors"
3:00 pm - 4:00 pm "Break with Exhibitors"
4:00 pm - 5:00 pm "Break with Exhibitors"
5:00 pm - 6:00 pm "Break with Exhibitors"
6:00 pm - 7:00 pm Welcome Reception for All Conference Attendees

Saturday, November 21, 2015

7:30 am - 9:00 am Breakfast
9:00 am - 10:15 am Estate Planning Law Specialist Certification Live Review Course & Exam
10:15 am - 12:00 pm "Break with Exhibitors"
12:00 pm - 2:00 pm "Break with Exhibitors"
2:00 pm - 3:00 pm "Break with Exhibitors"
3:00 pm - 4:00 pm "Break with Exhibitors"
4:00 pm - 5:00 pm "Break with Exhibitors"
5:00 pm - 6:00 pm "Break with Exhibitors"
6:00 pm - 7:00 pm Welcome Reception for All Conference Attendees
Council Leadership Day is a learning and sharing experience for volunteer leaders and staff (council leaders should attend this portion of the program). Nearly 50% of all council leaders and administrators (paid council staff) are devoted to philanthropic services and are the most constant presence within your estate planning council, and administrators are invited to attend the conference with the registration fee waived.

Council Leadership Day Schedule of Events

Wednesday, November 18, 2015

7:00 am - 9:00 am Breakfast with Exhibitors
8:00 am - 9:45 am 52nd Annual Advanced Estate Planning Strategies Conference
9:45 am - 10:45 am Sponsored Breakout Sessions (choose one on registration form)
10:45 am - 11:00 am Sponsored Breakout Sessions Resumes
11:00 am - 12:00 pm Welcome & Opening Remarks
12:00 pm - 1:00 pm Break with Exhibitors
1:00 pm - 3:00 pm Breakout Sessions (audience chooses one)
3:00 pm - 5:00 pm Professional Development Panel
5:00 pm - 6:00 pm Welcome Reception for All Conference Attendees
7:00 pm - 9:00 pm Welcome Reception for All Conference Attendees

Friday, November 20, 2015

7:00 am - 8:00 am Breakfast with Exhibitors
8:00 am - 9:00 am Welcome & Opening Remarks
9:00 am - 9:20 am Keynote Address 1: Setting the “New” Estate Planning Agenda
9:20 am - 10:20 am Improving (and/or Revisiting) Popular Estate Planning Strategies
10:20 am - 11:00 am Improving (or Revisiting) Popular Estate Planning Strategies
11:00 am - 12:00 pm Annual Awards & Gala Honoring & Recognizing the Best of the Best of Estate Planning
12:00 pm - 1:00 pm Lunch with Exhibitors
1:00 pm - 3:00 pm Annual Update on Federal Tax Law
3:00 pm - 5:00 pm Annual Update on Federal Tax Law
5:00 pm - 6:00 pm Annual Update on Federal Tax Law
6:00 pm - 8:00 pm Annual Update on Federal Tax Law
8:00 pm - 9:00 pm Welcome Reception for All Conference Attendees
9:00 pm - 10:00 pm Welcome Reception for All Conference Attendees

52nd Annual Advanced Estate Planning Strategies Conference Schedule of Events

Wednesday, November 18, 2015

12:30 pm - 2:00 pm Real Estate Planning Law Specialist Certification Law Review Course & Exam
2:00 pm - 3:30 pm Real Estate Planning Law Specialist Certification Law Review Course & Exam
3:30 pm - 5:00 pm Real Estate Planning Law Specialist Certification Law Review Course & Exam
5:00 pm - 6:00 pm Welcome Reception for All Conference Attendees

Thursday, November 19, 2015

3:45 pm - 5:15 pm The 30,000 Foot View from the Trenches: A Potpourri of Planning Potpourri
5:15 pm - 6:45 pm The Case(s) for Household Employment Compliance:
6:45 pm - 8:15 pm The Case(s) for Household Employment Compliance:
8:15 pm - 9:45 pm The Case(s) for Household Employment Compliance:
9:45 pm - 11:15 pm The Case(s) for Household Employment Compliance:
11:15 pm - 1:15 am The Case(s) for Household Employment Compliance:
1:15 am - 3:15 am The Case(s) for Household Employment Compliance:

See what you’ve missed!
Estate Planning Council Leaders & Administrators
Pre-Conference Sessions for Leader & Administrator Track
Leader & Administrator Track
multi-disciplinary teams will engage in collaborative dialogue based on a video case study
3:15 pm - 5:00 pm Council by Size Sharing Sessions Resume
Administrator Track
8:00 am - 12:00 pm Administrator Sharing Session
Administrator Track
7:00 am - 8:00 am Breakfast
Council Leadership Day Schedule of Events
Visit http://www.naepc.org/conference/leadership-day for a recap of activities from 2014!
12:00 pm on Thursday, November 19, 2015, please make travel plans
Current Trends, New Applications
The Secondary Market for Life Insurance:
Martin M. Shenkman, P.C.
Shenkman will provide a compilation of planning nuggets, all within the multi-disciplinary
approach to planning in the new estate planning world.
Saturday, November 19, 2015
7:00 am - 4:45 pm Leadership Day Conference
9:15 am - 9:45 am Annual Awards & Induction Ceremony
5:15 pm - 6:15 pm Exclusive AEP® and EPLS Designee Session: A Dialogue with Steve Akers
873x530
5:05 pm 52nd Annual Advanced Estate Planning Conference
873x434
7:00 am - 8:00 am Breakfast with Exhibitors
873x311
9:15 am - 9:45 am Annual Awards & Induction Ceremony
873x701
12:20 pm - 1:45 pm Lunch with Exhibitors
873x168
John W. Porter, B.B.A., JD, AEP® (Distinguished)
Dealing with Uncle Sam, Everyone’s Least Favorite Relative in the Family Business
Estate planners must recognize the tax traps and opportunities that accompany the client
with a closely-held business. This session will review the federal income tax issues and
with the law that governs third-party spendthrift trusts. It reveals that familiar spendthrift
trust rules, particularly regarding exception creditors (current or former spouses,
trustees, and without a cash settlement); and settlements for smaller face policies, using several
case examples to illustrate the concepts being presented. In addition, the seminar will
instruct on the use of this secondary market as an additional planning tool.
5:05 pm 52nd Annual Advanced Estate Planning Conference
Jeffrey N. Pennell, JD
Marital Property?
The discussion will include hard to value assets, formula clauses, 6166 issues, GRATs,
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Council Leadership Day provides separate tracks for leaders and administrators (paid council staff). The sessions are available throughout the day:

- **Leader Track**
  - 8:00 am - 9:45 am: Annual Business Meeting
  - 9:45 am - 10:15 am: Refreshment Break
  - 10:15 am - 12:00 pm: Lunch with Exhibitors
  - 12:20 pm - 1:45 pm: Lunch with Exhibitors
  - 1:45 pm - 2:20 pm: Sponsored Breakout Session: A Dialogue with Steve Allen

- **Administrator Track**
  - 9:15 am - 10:15 am: Break with Exhibitors
  - 10:15 am - 11:15 am: Estate Planning Hall of Fame® Induction Ceremony
  - 11:20 am - 12:05 pm: Nudging More Ethical Behavior Through Incentives and Checklists
  - 12:05 pm - 1:20 pm: Closing Remarks

Visit [http://www.naepc.org/conference/leadership-day](http://www.naepc.org/conference/leadership-day) for a recap of activities from 2014!
### 52nd Annual Advanced Estate Planning Strategies Conference

#### Attendance Registration

<table>
<thead>
<tr>
<th>Event Details</th>
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<tbody>
<tr>
<td><strong>November 19 - 21, 2015</strong></td>
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#### Fee Structure

<table>
<thead>
<tr>
<th>Structure</th>
<th>Fee (non-member)</th>
<th>Fee (member)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Conference Sessions</td>
<td>$325</td>
<td>$300</td>
</tr>
<tr>
<td>Add-on: Estate Planning Law Specialist Live Review Course &amp; Exam</td>
<td>$450 2-Day Program / $475 3-Day Program</td>
<td>$425 2-Day Program / $450 3-Day Program</td>
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<tr>
<td>3-Day Package</td>
<td>$900 (members only)</td>
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</tbody>
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#### Fee Inclusions

- Breakfast & Lunches
- Coffee/Tea
- Speaker notes
- Materials
- Program CD
- Postconference digital download of programs
- Free Complimentary WiFi
- Complimentary self-parking and in-room internet

#### Event Attendance

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>Welcome Reception</td>
<td>Wednesday, November 18, 2015</td>
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<tr>
<td>Fun Run</td>
<td>Thursday, November 19, 2015</td>
</tr>
<tr>
<td>Art Program</td>
<td>Friday, November 20, 2015</td>
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</tbody>
</table>

#### Conference Sponsors

- The Association of Choice for Estate Planning Professionals
- We are grateful for the support of the NAEPC Education Foundation

#### Attendee Benefits

- Conference App
- Conference Program and Updates
- Conference Directory
- Digital Download of Programs

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### Additional Information

- **Transportation:** Additional information about discounted hotel rates and shuttle service can be found on www.naepc.org.
- **Conference Sponsors:** Running this 52nd Annual Advanced Estate Planning Strategies Conference, the Estate Law Specialist Board is excited to offer an in-person review course and proctored Estate Planning Law Specialist exam on November 19, 2015 from 12:00 pm – 3:30 pm. The fee to participate is $150 for members of an estate planning council and $200 for a non-member.
- **Companion Program:** The companion program is offered as an accompaniment to the annual conference for those who will be attending with a regular registrant but not attending the educational sessions. The registration fee includes both the day of each event, the Tuesday evening Welcome Reception, and the complete, case-by-case description for each case that can be found on www.naepc.org.
- **Registration Information:** More information can be found on www.naepc.org or by visiting Conference@naepc.org.
Companion Programs & Tours

The companion program is offered as an accompaniment to the annual conference for those who will be attending with a regular registrant and not taking advantage of the educational sessions. The registration fee includes transportation to/from the East Coast at no charge to the companion. Half-day events are offered on Thursday, Friday, and Saturday.

Estate Planning Law Specialist Live Review Course & Proctored Exam

In partnership with the NAEPC Education Foundation, the Estate Law Specialist Board is excited to offer an in-person review course and proctored Estate Planning Law Specialist exam on Wednesday, November 18, 2015 from 12:30 pm – 5:00 pm. The fee to participate is $595 for members of an estate planning council and $645 for a non-member.

Once registered for the proctored exam, candidates will be contacted by the Estate Law Specialist Board with the application for certification, which must be completed and returned to the Estate Law Specialist Board by October 30, 2015. Registration will be accepted until Friday, October 9, 2015. Exam results will be communicated within thirty (30) days of receipt. For more information, contact the Estate Planning Law Specialist Board office at 912.651.2999 or visit www.naepc.org/designations/estate-law/introduction.

Amelia Island, Florida

Get a step back in time to the East Coast and Amelia Island was Florida’s first luxury beach destination set with pristine sands, pastel shutter colors and history. Amelia Island is renowned for its long stretches of pristine beaches, natural beauty, unique history, and charming waterscape.

For more information or to plan your trip: visit www.ameliaisland.com.