



# 52<sup>nd</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

with Pre-Conference Sessions for Council Leaders

· EDUCATION · COLLABORATION

November 18 - 20, 2015

Amelia Island, Florida · Omni Amelia Island Plantation

## Pre-Conference · Council Leader Day November 18, 2015

Sessions begin at 7:30 am

Leadership sharing sessions for estate planning council board members and staff take place today, including updates on benefits available to all affiliates. Afternoon sessions are held as private, volunteer-led discussion groups for leaders from councils of like-size. The NAEPC webmaster is also available to discuss the website platforms offered to councils through NAEPC.

Leadership Day concludes with the conference welcome reception for all registered attendees & companions.

## Annual Conference November 19, 2015

7<sup>th</sup> Annual Fun Run & Walk

**Sponsored Bonus Session · 7:00 am**

The Secondary Market for Life Insurance:  
Current Trends, New Applications  
Provided by Coventry

Planning Potpourri  
*Martin M. Shenkman, CPA, PFS, MBA,  
JD, AEP® (Distinguished)*

Life Insurance - Key Cases and  
Rulings of 2014-2015  
*Stephan R. Leimberg, JD,  
AEP® (Distinguished)*

Improving (and/or Revisiting) Popular  
Estate Planning Strategies  
*Richard A. Oshins, JD, LL.M., MBA,  
AEP® (Distinguished)*

Nudging More Ethical Behavior through  
Incentives and Checklists  
*Nancy B. Rapoport, JD*

Annual Update  
*Steve R. Akers, JD, AEP® (Distinguished)*

Portability or No: Death of the  
Credit Shelter Trust  
*Diana S.C. Zeydel, JD, LL.M.*

Special Private Session for  
Active AEP® Designees  
A Dialogue with Steve Akers, *JD,  
AEP® (Distinguished)*

## Annual Conference November 20, 2015

Dealing with Uncle Sam,  
Everyone's Least Favorite Relative  
in the Family Business  
*Samuel A. Donaldson, JD, LL.M.,  
AEP® (Distinguished)*

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

All About that Basis: Creative Ways to  
Obtain Basis at Death  
*Mickey R. Davis, JD*

The 30,000 Foot View from the  
Trenches: A Potpourri of Transfer Tax  
Issues on the IRS's Radar Screen  
*John W. Porter, B.B.A., JD,  
AEP® (Distinguished)*

**Sponsored Breakout Sessions**

**Option 1:** The Case(s) for Household  
Employment Compliance:  
Case Studies Illustrating How to Mitigate  
Tax & Legal Risk  
*Tom Breedlove*  
Provided by Care.com Homepay

**Option 2:** Financial Reform & Its Impact  
on Your Merchant Account  
*Janelle Benefield*  
Provided by LawPay

Due Diligence in Selecting and  
Understanding Life Insurance Policies  
*Michael W. Halloran, CFP®, CLU®, ChFC®,  
AEP® (Distinguished) Nominee*

Third Party Trusts in Divorce - Is a  
Beneficiary's Interest Marital Property?  
*Jeffrey N. Pennell, JD*

## Companion Program ·

White Oak Conservation Center

## \*Estate Planning Hall of Fame®

· 2015 ENTRANTS ·

Turney P. Berry, JD

Gerry W. Beyer, JD,  
LL.M., JSD

John DeBruyn, JD,  
LL.M. (taxation)

Michael W. Halloran, CFP®,  
CLU®, ChFC®

Michael D. Mulligan, JD

## Companion Program ·

Lofton Creek Kayaking

SPONSORS ·



## Companion Program ·

Art Program

Please note, companion programs and schedule subject to change.

**Lodging Information •**

The conference will take place at the newly re-imagined Omni Amelia Island Plantation resort, nestled at the tip of Amelia Island, north of Jacksonville International Airport. The conference room rate is \$199 (single/double occupancy plus applicable taxes) and includes complimentary self-parking and in-room internet, among other resort amenities.

Overnight accommodations can be made by calling (888) 261-6161 and using group code "110515National" or by booking at [www.naepc.org/conference](http://www.naepc.org/conference). Reservations must be made by 10/23/15.

**Cancellation Policy •**

Any cancellation must be received in writing or via email to conference@naepc.org. A full refund will be granted if notice is received on or before 09/30/15. Registrants who cancel between 10/01/15 and 10/31/15 will forfeit a \$100 administrative fee. No refunds will be granted on or after 11/01/15.

**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.**

**Transportation •**

Information about rental cars and shuttle service can be found at [www.naepc.org/conference](http://www.naepc.org/conference).

**Registrant Discounts •**

- \$50 Early Bird Discount (registration must be received by September 30, 2015)
- \$50 Active AEP® or EPLS designee
- \$50 Host Council Discount for Members of EPC of Northeast Florida
- \$100 NAEPC Volunteer Discount (available to non-board members of any committee of NAEPC)

|  |                               |
|--|-------------------------------|
| 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       |

|  | Member**     | Non-Member |
|--|--------------|------------|
| <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. |              |            |
| <input type="checkbox"/> I will attend the welcome reception on Wednesday, November 18, 2015   |              |            |
| <input type="checkbox"/> I will participate in the fun run on Thursday, November 19, 2015 at 5:45 am   |              |            |
| <input type="checkbox"/> I am an active AEP® and will participate in the private session on Thursday, November 19, 2015  |              |            |
| <input type="checkbox"/> My Thursday sponsored breakout choice is Option _____   |              |            |
| <input type="checkbox"/> I have read and understand both the continuing education credit and cancellation policies (left panel).   |              |            |

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|--|--------------|----------------|
| <b><u>Conference Educational Package</u></b>   | <b>\$850</b> | <b>\$1,100</b> |
| 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 18, 2015   |              |                |
| <input type="checkbox"/> I will participate in the fun run on Thursday, November 19, 2015 at 5:45 am                                       |              |                |
| <input type="checkbox"/> I am an active AEP® and will participate in the private session on Thursday, November 19, 2015                    |              |                |
| <input type="checkbox"/> My Thursday sponsored breakout choice is Option _____   |              |                |
| <input type="checkbox"/> I have read and understand both the continuing education credit and cancellation policies (left panel).           |              |                |

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|---|--------------|
| <b><u>3-Day Companion Registration Package</u></b>  | <b>\$475</b> |
| Includes conference breakfasts, the Wednesday – Friday companion tours & Wednesday welcome reception. |              |
| <input type="checkbox"/> I will attend the companion tour on Wednesday, November 18, 2015             |              |
| <input type="checkbox"/> I will attend the welcome reception on Wednesday, November 18, 2015          |              |
| <input type="checkbox"/> I will participate in the fun run on Thursday, November 19, 2015 at 5:45 am  |              |
| <input type="checkbox"/> I will attend the companion tour on Thursday, November 19, 2015              |              |
| <input type="checkbox"/> I will attend the companion tour on Friday, November 20, 2015                |              |

|  |              |
|--|--------------|
| <b><u>2-Day Companion Registration Package</u></b>   | <b>\$450</b> |
| Includes conference breakfasts, the Thursday – Friday companion tours & Wednesday welcome reception. |              |
| <input type="checkbox"/> I will attend the welcome reception on Wednesday, November 18, 2015         |              |
| <input type="checkbox"/> I will participate in the fun run on Thursday, November 19, 2015 at 5:45 am |              |
| <input type="checkbox"/> I will attend the companion tour on Thursday, November 19, 2015             |              |
| <input type="checkbox"/> I will attend the companion tour on Friday, November 20, 2015               |              |

|  |       |
|--|-------|
| <b><u>Fee Computation &amp; Payment Instructions</u></b>     |       |
| Primary Registrant Fee                                       | _____ |
| Less discount(s) - see left panel                            | _____ |
| Companion Registrant Fee                                     | _____ |
| Subtotal   | _____ |
| Add \$50 late fee if postmarked on or after 10/31/15 - TOTAL | _____ |

\*\*A member is defined as an active Accredited Estate Planner® designee, Estate Planning Law Specialist designee, or member of an estate planning council affiliated with NAEPC.

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      |           |