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.

Companion Program -
White Oak Conservation Center

Annual Conference
November 19, 2015

7th 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)

Companion Program -
Lofton Creek Kayaking

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 -
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. 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.

### 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)

### Fee Computation & Payment Instructions

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<tr>
<th>Description</th>
<th>Amount</th>
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<tr>
<td>Primary Registrant Fee</td>
<td><strong>Member</strong> $900</td>
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<tr>
<td>Conference Educational Package</td>
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<tr>
<td>3-Day Companion Registration Package</td>
<td>$475</td>
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<tr>
<td>2-Day Companion Registration Package</td>
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**Member** includes 3-day conference, continental breakfasts & luncheons, the Wednesday evening welcome reception, and council sponsored private session(s) on Thursday, November 19, 2015.

**Non-Member** includes 2-day conference, continental breakfasts & luncheons, the Wednesday evening welcome reception, and council sponsored private session(s) on Thursday, November 19, 2015.

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

Account Number ___________ Exp. Date ___________

Signature ___________

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**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.