Pre-Conference - Council Leader Day
November 16, 2016

Sessions begin at 7:00 am
Council Leader Day offers a learning and sharing experience for volunteer leaders and staff of estate planning councils from across the country. The morning includes an abbreviated Annual Meeting, the Council of Excellence Awards presentation, and a very special session, “Understanding and Embracing Your Role as a Nonprofit Leader.” Meetings with the webmaster will also be available.

The entire afternoon is devoted to private, volunteer-led discussion groups for leaders from councils of like-size.

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

Annual Conference, Day I
November 17, 2016

8th Annual 2-Mile Fun Run & Walk

The Critical Importance of High Investment Returns and Tax Free Compounding, and How to Achieve Them
Jonathan G. Blattmachr, Esq., AEP® (Distinguished)

Ten Charitable Planning Ideas for the Current Environment
Kathryn W. Miree

The Mathematics of Estate Planning
Robert S. Keebler, CPA, MST, AEP® (Distinguished)

Collaboration Across Small and Great Divides: Teamwork, Tensions, and Client-Center Solutions
Nancy B. Rapoport, JD

Privileges/Valuation - Exploring Privileges in the Context of Hiring Appraisers
Stephanie Loomis-Price, JD

What Can We Learn from the Estates of Deceased Celebrities?
John J. Scroggin, JD, LL.M., AEP®

Exculsive Session for Active AEP® Designees, 5:15 pm – 6:15 pm
Fearless Public Speaking for Estate Planners, a Dialogue with Conrad Teitell, LL.B., LL.M., AEP® (Distinguished)

Annual Conference, Day II
November 18, 2016

Annual Tax Update
Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)

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

An Interview on the Nature and Practice of Our Profession and its Capacity to Meet the Challenges of the “Shirt Sleeves” Proverb
James E. Hughes, JD

The Governing Law Clause in Trusts - Not Just Boilerplate Anymore
Jeffrey Schoenblum, JD, AEP® (Distinguished) Nominee

Family and Multi-Disciplinary Team Dynamics for High Performance Family Wealth and Business Succession Planning
Kathy K. Wiseman

Sponsored Breakout Sessions
Loan Regime Split-Dollar for Both Single and Joint Lives
Michael Amoia, JD, LL.M., CFP®, CLU®, ChFC®

Companion Tour
9:00 am – 3:00 pm

Please note, companion programs and schedule subject to change.
Lodging Information •

The conference will take place at The Wigwam. Originally built in 1918 as a gathering place for the Ohio-based executives of Goodyear Tire & Rubber, this Phoenix resort has maintained a reputation as one of the Southwest’s landmark resort destinations. The NAEPC room rate is $179 (single or double occupancy plus applicable taxes) plus a $6/night resort fee. The resort fee includes in-room internet, access to the fitness center, and overnight self-parking, among other amenities.

Overnight accommodations can be made by calling (800) 327-0396 and letting the reservationist know you are with NAEPC or by booking online at www.naepc.org/conference. Reservations must be made by 10/21/16.

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 09/30/16. Registrants who cancel between 10/01/16 and 10/31/16 will forfeit a $100 administrative fee. No refunds will be granted on or after 11/01/16. Requests to transfer a registration will be accommodated.

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.

Registrant Discounts •

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<th>Amount</th>
<th>Discount Description</th>
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<tr>
<td>$50</td>
<td>Early Bird Discount</td>
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<td>(registration must be received by 09/30/16)</td>
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<tr>
<td>$50</td>
<td>Active AEP® or EPLS designee</td>
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<tr>
<td>$50</td>
<td>Host Council Discount for Members of all Arizona EPCs</td>
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<tr>
<td>$100</td>
<td>NAEP Volunteer Discount (available to non-board members of any committee of NAEP)</td>
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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.

Additional information is available at www.NAEPC.org/conference.

Fee Computation & Payment

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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 NAEP.

Account Number __________________ Exp. Date ____________
Signature __________________________

53rd Annual NAEPC Advanced Estate Planning Strategies Conference • November 16 - 18, 2016 • Litchfield Park, Arizona
1120 Chester Ave., Ste. 470 • Cleveland, OH 44114 • Phone (866) 226-2224 • conference@naepc.org • www.naepc.org