53rd Annual Advanced Estate Planning Strategies Conference
November 16-18, 2016
Litchfield Park, Arizona
The Wigwam® & Litchfield Park, Arizona
The 53rd Annual NAEP Education Foundation Conference will be held at The Wigwam, located among the world-renowned Elizabeth Arden Red Door Spa, tennis, and several nearby scenic attractions.

For more information about this event please visit www.naepc.org/conference.

We are grateful for the support of the following Conference Sponsors, including:

Premier Sponsors

Ashar Group
Trusted Estates, LLC
Sterling

Conference Sponsors, including

Estate Planning Strategies

53rd Annual NAEP Education Foundation Conference with Pre-Conference Sessions for Council Leaders
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Estate Planning Strategies
Pre-Conference Sessions for Estate Planning Council Leaders & Administrators

Council Leadership Day is a learning and sharing experience for volunteer leaders and staff from across the country. The Thursday sessions include a social annual business meeting and discussion of recent activities among council leaders and administrators.

Council Leadership Day Schedule of Events

Wednesday, November 16, 2016

7:00 am - 8:00 am Breakfast Leader's Lunch & Learn #1 (Moderated by John J. Scroggin, JD, LL.M., AEP)

10:15 am - 10:45 am Breakfast Leader's Lunch & Learn #2 (Moderated by John J. Scroggin, JD, LL.M., AEP)

12:30 pm - 1:00 pm Lunch with Exhibitors

1:00 pm - 1:30 pm Lunch with Exhibitors

1:30 pm - 2:00 pm Lunch with Exhibitors

2:00 pm - 3:00 pm Lunch with Exhibitors

2:30 pm - 3:00 pm Lunch with Exhibitors

3:30 pm - 4:00 pm Lunch with Exhibitors

4:00 pm - 4:30 pm Summary Leadership Session

5:15 pm - 6:15 pm Annual Awards & Recognition Dinner

Thursday, November 17, 2016

6:35 am - 6:45 am Breakfast Leader's Lunch & Learn #1 (Moderated by John J. Scroggin, JD, LL.M., AEP)

7:30 am - 8:30 am Breakfast Leader's Lunch & Learn #2 (Moderated by John J. Scroggin, JD, LL.M., AEP)

10:15 am - 10:45 am Breakfast Leader's Lunch & Learn #3 (Moderated by John J. Scroggin, JD, LL.M., AEP)

11:30 am - 12:30 pm Lunch with Exhibitors

2:30 pm - 3:00 pm Lunch with Exhibitors

3:30 pm - 4:00 pm Lunch with Exhibitors

4:00 pm - 4:30 pm Lunch with Exhibitors

5:15 pm - 6:15 pm Annual Awards & Recognition Dinner

National Association of Estate Planners & Councils

53rd Annual Conference and Exhibition

Recognizing Excellence in Estate Planning & Service to the Profession

Jeffrey Schoenblum, JD

Diploma Ceremony Thursday, November 18th at 11:00 a.m.
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, November 16, 2016</td>
<td>7:00 am - 8:00 am Breakfast with Exhibitors</td>
</tr>
<tr>
<td>Thursday, November 17, 2016</td>
<td>6:30 am - 9:00 am Breakfast with Exhibitors</td>
</tr>
<tr>
<td>Friday, November 18, 2016</td>
<td>8:00 am - 9:00 am Breakfast with Exhibitors</td>
</tr>
</tbody>
</table>
Council Leadership Day is a learning and sharing experience for volunteer leaders and staff. The learning and sharing experience for volunteer leaders and staff.

6:30 am - 10:15 am
Council Executive Award Presentations
Kathryn W. Miree & Associates, Inc.
Kathryn W. Miree

Pioneered by Lodmell & Lodmell nearly 20 years ago, the “Bridge Trust®” combines the strength of a domestic tools and an understanding of the “Bridge Trust®” which combines the strength of an offshore SCIN; private annuities; and the “tax burn” SCIN technique.

10:15 am - 12:15 pm
Adding Asset Protection to Your Practice Using the “Bridge Trust®”
Jonathan G. Blattmachr, Esq., AEP

Adding Asset Protection to Your Practice Using the “Bridge Trust®”.

The backdrop for charitable planning keeps changing, with rapidly changing investment markets, low tax rates, and a tightening legislative environment. While donors are continuing to give, they are seeking ways to maximize results. How do you identify charitable giving options that best fit the needs of your clients? For example, the donor may have a charitable goal, but how do you select the right structure that is most effective for that goal? Our focus will be on how to determine the optimal structure for the benefit of the donor, and the most effective strategies to provide the other party with a substantial benefit.

12:30 pm - 1:30 pm
Lunch with Exhibitors

1:30 pm - 2:30 pm
Innovative Tax Planning Strategies and How to Help Your Clients Capture Benefits That Currently Exist, but May Be Lost (or at Least Whittled Away)
Robert S. Keebler, CPA/PFS, MST, AEP

Nearly 50% of all affiliated councils send at least one representative to Council Leadership Day each year.

Council Leadership Day is a learning and sharing experience for volunteer leaders and staff of estate planning councils. The learning and sharing experience for volunteer leaders and staff.

6:30 am - 7:45 am
Annual Business Meeting (morning session)
Kathryn W. Miree & Associates, Inc.
Kathryn W. Miree

Break with Exhibitors

12:15 pm - 1:15 pm
Leadership Lunch with Exhibitors

1:15 pm - 2:15 pm
Estate Planning Hall of Fame

2:15 pm - 3:15 pm
National Board Meeting

3:15 pm - 4:15 pm
Council on Estate Planning Law Sessions Review

4:15 pm - 5:15 pm
Annual Conference Reception for Affiliated Councils and Registered Attendees

5:15 pm - 6:30 pm
Annual Conference Dinner

5:15 pm - 6:30 pm
Annual Conference Dinner

6:30 am - 10:15 am
Council President’s Round Table

10:15 am - 10:45 pm
Break with Exhibitors

10:45 am - 11:45 am
Leadership Breakout Sessions

11:45 am - 12:45 pm
Leadership Breakout Sessions

12:45 pm - 1:45 pm
Lunch with Exhibitors

1:45 pm - 2:45 pm
Reflecting on the Past for Exceptional Success 

2:45 pm - 3:45 pm
Visualizing the Future for Exceptional Success

3:45 pm - 4:45 pm
Council Executive Award Presentations
Kathryn W. Miree & Associates, Inc.
Kathryn W. Miree

Tuesday, November 17, 2015
6:30 am - 8:30 am
Pre-Conference Sessions for Estate Planning Council Leaders & Administrators

8:30 am - 10:30 am
National Board Meeting

10:30 am - 11:30 am
National Board Meeting

11:30 am - 12:30 pm
Reflections - The School of Hard Knocks

12:30 pm - 1:30 pm
Lunch with Exhibitors

1:30 pm - 2:30 pm
Reflections - The School of Hard Knocks

2:30 pm - 3:30 pm
Reflections - The School of Hard Knocks

3:30 pm - 4:30 pm
Reflections - The School of Hard Knocks

4:30 pm - 5:30 pm
Reflections - The School of Hard Knocks

5:30 pm - 6:30 pm
Reflections - The School of Hard Knocks

6:30 pm - 7:30 pm
Annual Conference Reception for Affiliated Councils and Registered Attendees

7:30 pm - 8:30 pm
Annual Conference Dinner

8:30 am - 10:00 am
Council Leadership Day - Session 6

10:00 am - 11:00 am
Council Leadership Day - Session 6

11:00 am - 12:00 pm
Council Leadership Day - Session 6

12:00 pm - 1:00 pm
Lunch with Exhibitors

1:00 pm - 2:00 pm
Council Leadership Day - Session 6

2:00 pm - 3:00 pm
Council Leadership Day - Session 6

3:00 pm - 4:00 pm
Council Leadership Day - Session 6

4:00 pm - 5:00 pm
Council Leadership Day - Session 6

5:00 pm - 6:00 pm
Council Leadership Day - Session 6

6:00 pm - 7:00 pm
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7:00 pm - 8:00 pm
Council Leadership Day - Session 6

8:00 pm - 9:00 pm
Council Leadership Day - Session 6

9:00 pm - 10:00 pm
Council Leadership Day - Session 6

10:00 pm - 11:00 pm
Council Leadership Day - Session 6

11:00 pm - 12:00 am
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1:00 am - 2:00 am
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2:00 am - 3:00 am
Council Leadership Day - Session 6

3:00 am - 4:00 am
Council Leadership Day - Session 6

4:00 am - 5:00 am
Council Leadership Day - Session 6
## Council Leadership Day Schedule of Events

**Wednesday, November 16, 2016**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 am – 8:00 am</td>
<td>Breakfast <strong>Leader &amp; Administrator Track</strong></td>
</tr>
<tr>
<td>8:00 am – 10:15 am</td>
<td>Keynote breakfast and opening remarks (via video)</td>
</tr>
<tr>
<td>10:15 am – 10:30 am</td>
<td>Break and refreshments</td>
</tr>
<tr>
<td>10:30 am – 12:00 pm</td>
<td>Workshop: The Critical Importance of Investment Returns and Tax Consequences and How to Assess Them <strong>Leader &amp; Administrator Track</strong></td>
</tr>
<tr>
<td>12:00 pm – 1:00 pm</td>
<td>Lunch with Exhibitors</td>
</tr>
<tr>
<td>1:00 pm – 2:00 pm</td>
<td>Break with Exhibitors</td>
</tr>
<tr>
<td>2:00 pm – 5:15 pm</td>
<td>Workshop: The Governing Law Clause in Trusts - Not Just Boilerplate Anymore <strong>Leader &amp; Administrator Track</strong></td>
</tr>
<tr>
<td>5:15 pm – 6:15 pm</td>
<td>Break and refreshments</td>
</tr>
<tr>
<td>6:15 pm – 7:00 pm</td>
<td>Dinner</td>
</tr>
</tbody>
</table>

**Thursday, November 17, 2016**

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>8:00 am – 10:15 am</td>
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<tr>
<td>10:15 am – 10:30 am</td>
<td>Break and refreshments</td>
</tr>
<tr>
<td>10:30 am – 12:00 pm</td>
<td>Workshop: The Mathematics of Estate Tax Planning and Planning After Death <strong>Leader &amp; Administrator Track</strong></td>
</tr>
<tr>
<td>12:00 pm – 1:00 pm</td>
<td>Lunch with Exhibitors</td>
</tr>
<tr>
<td>1:00 pm – 2:00 pm</td>
<td>Break with Exhibitors</td>
</tr>
<tr>
<td>2:00 pm – 3:20 pm</td>
<td>Sponsored Session provided by Sterling Foundation Management <strong>Leader &amp; Administrator Track</strong></td>
</tr>
</tbody>
</table>

## Council Leadership Day Recap

Visit [http://www.naepc.org/about/conference/leadership-day](http://www.naepc.org/about/conference/leadership-day) for a recap of activities from 2015! 

---

**Pre-Conference Sessions for Estate Planning Council Leaders & Administrators**

- National Association of Estate Planners & Councils (NAEPC)
- National Association of Estate Planning Counselors (NAEPC)
- National Association of Estate Planning Attorneys (NAEPA)
- National Association of Estate Planning Advocates (NAEPA)
- National Association of Estate Planning Professionals (NAEPP)
- National Association of Estate Planning Strategists (NAEPS)
- National Association of Estate Planning Tax Planners (NAEPT)
- National Association of Estate Planning Trust Planners (NAEPT)
- National Association of Estate Planning Wealth Planners (NAEPT)
- National Association of Estate Planning Women (NAEPW)

**National Association of Estate Planners & Councils (NAEPC)**

- **Recognizing Excellence in Estate Planning Service to the Profession**
  - Jeffrey Schoenberg, JD
  - John A. Zenden, JD, LE, LLM, M.Ed.
  - Induction Ceremony Friday, November 18th at 9:30 am
Register Online www.naepc.org/conference

Fee Structure

<table>
<thead>
<tr>
<th>Conference &amp; Session</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Annual Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders</td>
<td>$975 (members only)</td>
</tr>
<tr>
<td>3rd Annual Advanced Estate Planning Strategies Conference</td>
<td>$875 (individual)</td>
</tr>
</tbody>
</table>

Companion Program & Tours

<table>
<thead>
<tr>
<th>Event Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 16, 2016</td>
<td>Welcome Reception (5:00 pm)</td>
</tr>
<tr>
<td>November 16, 2016</td>
<td>Private Session for AEP &amp; EPLS Designees (5:15 pm)</td>
</tr>
<tr>
<td>November 17, 2016</td>
<td>Fun Run (5:45 am)</td>
</tr>
<tr>
<td>November 17, 2016</td>
<td>Companion Tour (5:15 pm)</td>
</tr>
<tr>
<td>November 17, 2016</td>
<td>Designation Informational Session (5:15 pm)</td>
</tr>
<tr>
<td>November 17, 2016</td>
<td>AEP Conference Dinner (9:00 pm)</td>
</tr>
<tr>
<td>November 18, 2016</td>
<td>Wigwam Resort &amp; Country Club Tour (7:00 am)</td>
</tr>
<tr>
<td>November 18, 2016</td>
<td>Pre-Conference Sessions for Council Leaders (9:00 am)</td>
</tr>
<tr>
<td>November 18, 2016</td>
<td>Conference Tour (5:15 pm)</td>
</tr>
</tbody>
</table>

Companion Package $475

The companion program is offered as an accommodation to the annual conference for those who will be attending with a regular registered, but not benefiting from the educational sessions. The conference will take place on Wednesday, November 16, and Wednesday evening Welcome Reception, breakfast the day of each tour, and in the outings. A complete description for each tour can be found at www.naepc.org/conference.

Exhibitor Plus Sponsors

<table>
<thead>
<tr>
<th>Sponsor Name</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sterling</td>
<td>Email: <a href="mailto:lloyd@sterlingtrust.com">lloyd@sterlingtrust.com</a></td>
</tr>
<tr>
<td>Ashar</td>
<td>Phone: 800-288-8377</td>
</tr>
<tr>
<td>Litchfield Park, Arizona</td>
<td>Website: <a href="http://www.sterlingtrust.com">www.sterlingtrust.com</a></td>
</tr>
</tbody>
</table>

The Wigwam Resort & Country Club

The Wigwam Resort & Country Club is a world-class facility located in Litchfield Park, Arizona. The resort offers a variety of amenities, including two championship golf courses, a luxury spa, and a number of dining options. It is the perfect destination for those attending the conference, offering a relaxing and enjoyable experience.

For more information about the conference, please visit www.wigwamarizona.com.
53rd Annual Advanced Estate Planning Strategies Conference

Register Online www.naepc.org/conference

The Wigwam & Litchfield Park, Arizona

The 53rd Annual NAEPC Advanced Estate Planning Strategies Conference will take place at The Wigwam located in beautiful Litchfield Park, Arizona, approximately 25 miles west of Phoenix Sky Harbor International Airport. Litchfield Park, Arizona is a unique community offering a wide variety of options for relaxation and entertainment. The area offers a wide variety of shopping and eating opportunities. The Wigwam was originally built in 1929 as a gathering place for the 1932 World’s Fair. The Wigwam is a perfect blend of desert and tropical ambiance. The Wigwam is situated on 250 acres of beautifully landscaped grounds and features a championship golf course, tennis, and world-renowned Elizabeth Arden Red Door Spa, tennis, and numerous restaurants. A complete description for each tour can be found at www.naepc.org/conference.

Companion Program & Tours

The companion program is offered as an accompaniment to the annual conference for those who will be attending with a regular registrant, but will not be taking advantage of the educational sessions. The companion registration fee includes the Wednesday evening Welcome Reception, breakfast the day of each tour, and the outings. A complete description for each tour can be found at www.naepc.org/conference.

Companion Packages

$475 Companion Package

In addition to regular registrant, includes event access, two tours, a continental breakfast on each tour day, and complimentary registration for either event.

$350 Early Bird Companion Package

Register as an Early Bird Companion prior to 10/1/16, transfers will be accepted.

$275 Early Bird Companion Package

Register as an Early Bird Companion prior to 10/1/16, transfers will be accepted.

Transporation

All transportation, including air travel and ground transportation, is the responsibility of the participant. The Wigwam will provide complimentary transportation to the Wigwam and back to the hotel. Transportation will also be provided for the Wednesday evening Welcome Reception, breakfast the day of each tour, and the outings. A complete description for each tour can be found at www.naepc.org/conference.

Companion Program & Tours

AEP Sessions for Council Leaders (5:15 pm)

Pre-Conference Sessions for Council Leaders (5:15 pm)

Defining Future: The Changing Estate Planning Marketplace

We are grateful for the support of the 53rd Annual NAEPC Advanced Estate Planning Strategies Conference Sponsors, including

PREMIER SPONSORS

We are grateful for the support of the 53rd Annual NAEPC Advanced Estate Planning Strategies Conference Sponsors, including

PREMIER SPONSORS

S E V E N T E E N

30th Anniversary Awards Luncheon

November 18, 2016

The Wigwam, Litchfield Park, Arizona

Registration:

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The Association of Choice for Estate Planning Professionals

Litchfield Park, Arizona

November 16-18, 2016

The Wigwam

The Wigwam & Litchfield Park, Arizona

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