Pre-Conference · Council Leader Day
November 15, 2017

- 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 special sessions for council leaders, “Communication Across Generations and the Impact of Family Philanthropy” provided by Sharna Goldseker of 21/64.

The entire afternoon is devoted to private, volunteer-led discussion groups for leaders from councils of like-size. Meetings with the NAEPC Webmaster will also be available.

Council Leader Day concludes with the conference welcome reception at 5:00 pm for all registered attendees & companions.

Estate Planning Hall of Fame®

- 2017 ENTRANTS -

Vincent M. D’Addona, CLU®, ChFC®, RICP®, RFC, CExP™, MSFS
Donald O. Jansen, JD, LL.M.
R. Hugh Magill, JD
Edward Mendlowitz, CPA
Joshua S. Rubenstein, JD
John J. Scroggin, JD, LL.M., (taxation)

Please join us at the induction ceremony on Friday morning.

Annual Conference Day I
November 16, 2017

9th Annual 2-Mile Fun Run & Walk, 5:45 am

Companion Tour · 9:00 am – 3:00 pm

7:00 am Bonus Session provided by Berkshire Settlements, Inc.
Life Insurance in Estate Planning:
Beyond the Role of Benefits for Beneficiaries & Tax Strategies
Darwin M. Bayston, CFA
Modern Uses of Partnerships in Estate Planning
Paul S. Lee, JD, LL.M. (taxation), AEP® (Distinguished)
Product Selection and Design: Which Type of Product to Use in Common
Estate and Financial Planning Scenarios and How to Design and Fund It
Charles L. Ratner, JD, CLU®, ChFC®, AEP® (Distinguished)

Sponsored General Session provided by Ashar Group / Ashar SMV
Advanced Planning Applications for Market-Based Life Insurance Valuations
William J. Clark, Jamie L. Mendelsohn & Jon B. Mendelsohn

How Slippage and Gray Areas Lead Us into Ethical Lapses
Marianne M. Jennings, JD

Minimizing Family Conflicts in Estate Planning
John J. Scroggin, JD, LL.M., (taxation), AEP® (Distinguished) Nominee

Current Issues in Estate and Gift Tax Audits and Litigation
John W. Porter, B.B.A., JD, AEP® (Distinguished)

Exclusive AEP® Designee & EPLS Session, 5:15 pm
A Discussion with Turney P. Berry, JD, AEP® (Distinguished)
Lodging Information

NAEPC is delighted to host its 54th Annual Conference at The Roosevelt New Orleans. Steeped in history, The Roosevelt New Orleans and the land on which it sits was home to many interesting buildings prior to opening as the lavish Grunewald Hotel in 1893. To learn more about the history of this special hotel, click HERE.

The NAEPC room rate is $279 / night single or double occupancy (plus applicable taxes and fees). Additional room and suite options are available. Reservations can be made online at www.NAEPC.org/conference or by calling (888) 887-1006 and letting the reservationist know you are with NAEPC. Reservations must be made by 10/20/17.

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 09/29/17. Registrants who cancel between 09/30/17 and 10/31/17 will forfeit a $100 administrative fee. No refunds will be granted on or after 11/01/17. Requests to transfer a registration will be accommodated.

Continuing Education Credit

Continuing education credit is 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

$50 Early Bird Discount (registration must be received by 09/30/17)
$50 Active AEP® or EPLS designee
$50 Host Council Discount for Members of New Orleans EPC
$100 NAEPC Volunteer Discount (available to non-board members of any committee of NAEPC)

Make check payable to "NAEPC" 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.

Fee Computation & Payment

Primary Registrant Fee
Less discount(s) - see left panel
Companion Registrant Fee
Subtotal
Add $50 late fee if postmarked on or after 10/31/17 - TOTAL

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

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