54th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders

November 15-17, 2017
New Orleans, Louisiana
The Roosevelt New Orleans

Brought to you by the National Association of Estate Planners & Councils
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Brought to you by the National Association of Estate Planners & Councils
Pre-Conference Sessions for Estate Planning Council Leaders & Council Executives/Administrators

Council Leadership Day is a learning and sharing experience for leaders and staff of estate planning councils from across the country. The morning sessions feature a brief annual business meeting and afternoon sessions are devoted to idea-sharing and discussion of best practices among council leaders and administrators.

Council Leadership Day provides separate tracks for leaders and council executives/administrators (past staff). The sessions for administrators carry through 12:00 p.m. on Thursday, November 16, 2017 so please make travel plans accordingly. To encourage attendance from the most experienced group within your estate planning council, council executives are invited to attend the conference with the registration fee waived.

Council Leadership Day Schedule of Events

Wednesday, November 15, 2017
7:00 a.m - 8:00 am
Breakfast with Exhibitors
8:00 a.m - 9:15 a.m
Annual Mission (council leaders should attend this portion of the program)
Leader & Executive/Administrator Track

9:15 a.m - 10:30 a.m
Council by Size Sharing Sessions – Leader & Executive/Administrator Track
1:00 pm - 2:45 pm
Executive/Administrator Track

10:50 a.m - 11:50 a.m
Optional Concurrent Sessions (please indicate attendance on the registration form):
9:15 a.m - 10:15 a.m
Life Insurance in Estate Planning: Beyond the Role of Beneficiaries and Tax Strategies
8:00 a.m - 8:15 a.m
Life Insurance: Planning Possibilities

11:20 a.m - 12:20 p.m
Tax-Efficient Drawdown Strategies During Retirement
2:25 pm - 3:25 pm
Closing Remarks
4:45 pm
Opening Remarks

11:20 a.m - 12:20 p.m
Sponsored Session provided by Ashar Group, LLC / Ashar SMN
Pre-Conference Sessions for Estate Planning Council Leaders & Council Executives/Administrators

Sponsored by and with support from Ashar Group, LLC / Ashar SMN

See what you’ve missed!
Visit http://www.naepc.org/conference/leadership-day for a recap of council leadership day activities from 2016!

Schedule and timing subject to change

54th Annual Estate Planning Strategies Conference Schedule of Events

Wednesday, November 15, 2017
10:30 am - 12:00 pm
Optional Concurrent Sessions (please indicate attendance on the registration form): 8:00 am - 8:15 a.m
Life Insurance: Planning Possibilities

11:20 a.m - 12:20 p.m
Tax-Efficient Drawdown Strategies During Retirement
2:25 pm - 3:25 pm
Closing Remarks
4:45 pm
Opening Remarks

11:20 a.m - 12:20 p.m
Sponsored Session provided by Ashar Group, LLC / Ashar SMN

10:50 a.m - 11:50 a.m
Optional Concurrent Sessions (please indicate attendance on the registration form): 9:15 a.m - 10:15 a.m
Life Insurance in Estate Planning: Beyond the Role of Beneficiaries and Tax Strategies

11:20 a.m - 12:20 p.m
Sponsored Session provided by Ashar Group, LLC / Ashar SMN
Pre-Conference Sessions for Estate Planning Council Leaders & Council Executives/Administrators
Pre-Conference Sessions for Estate Planning Council Leaders & Council Executives/Administrators

Council Leadership Day is a learning and sharing experience for leaders and staff of estate planning councils across from the country. The morning sessions feature a brief annual business meeting and afternoon sessions are devoted to idea-sharing and discussion of best practices among council leaders and administrators.

Council Leadership Day provides separate tracks for leaders and council executives/administrators (past staff). The sessions for administrators carry through 12:20 on Tuesday, November 14, 2017 so please make travel plans accordingly. To encourage attendance from the most current expertise within your estate planning council, council executives are invited to attend the conference with the registration fee waived.

Council Leadership Day Schedule of Events
Wednesday, November 15, 2017
7:00 am - 8:00 am
Breakfast
8:00 am - 10:15 am
Annual Meeting (council leaders should attend this portion of the program)
Leader & Executive/Administrator Track

8:30 am - 9:15 am
Break with Exhibitors

9:30 am - 11:15 am
Estate Planning Current Developments and Hot Topics
Scott Lessard, CDFA
Scott Lessard is a Certified Divorce Financial Advisor and the President of Lessard Divorce Economics, a specialized divorce economics firm.

11:15 am - 12:00 pm
Break with Exhibitors

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

Council Executive/Administrator Schedule of Events
Thursday, November 16, 2017
9:45 am - 10:45 am
Sponsored Session provided by Ashar Group, LLC / Ashar SMV
Advanced Planning Applications for Market Based Life Insurance Valuations
William J. Clark, James L. Mendenhall & Jon M. Mendenhall
Ashar Group, LLC
Longstanding medical underwriting and policy valuation methodologies that are adhered to willliving buying/sellling principals are changed during the discussion of market generation and senior clients. This presentation will examine several advanced planning case studies and demonstrate the value of knowing your client’s specific time horizon and the fair market value of their life insurance assets – a much-needed tool for fiduciaries and a door opener for financial professionals seeking to deepen their relationships with clients of interest.

11:30 am - 1:15 pm
Luncheon with Exhibitors

54th Annual Estate Planning Strategies Conference Schedule of Events
Wednesday, November 15, 2017
10:30 am - 12:00 pm
Upcoming Trends in Litigation for Estate Tax Audits and Litigation
John W. Porter, B.B.A., J.D. (Distinguished)
Baker & Hostetler LLP
This presentation will address a number of current audit and litigation issues from the perspective of a seasoned litigator who works with the IRS on a daily basis. The discussion will also include a requested analysis to the transfer of hard-to-value assets (including the section 2704 Proposed Regulations), formulas clauses, GRATS, BERTS, tax return preparation issues, privilege issues, and related tax penalty issues.

2:20 pm - 3:20 pm
Minimizing Family Conflicts in Estate Planning
John J. Scroggin, JD, LL.M. (Taxation), AEP® (Distinguished) Nominee
Scroggin & Company, P.C.
The volume of conflict among heirs has exploded in the past three decades and occurs across all levels of family wealth. The presentation will focus on some of the major sources of estate and trust conflicts and cite numerous examples. Scroggin will focus on simple and practical ways that advisors can help minimize family conflicts while still protecting the interests of heirs.

4:00 pm - 5:00 pm
How Stopping Grants and Areas Lead to Ethical Lapses
Dasheen Mathur, North Carolina State University
We all have heard about “the slippery slope.” Truth be told, the slope is not slippery at first. If it were, we would feel it and catch ourselves. The hard truth is that these first steps into the grey areas are harmless. This presentation will focus on developing the delegation skills we need to recognize the phases of the process and make the risks we take without ethics testing into grey walking.

5:15 pm - 6:15 pm
Optional Cocktail Reception (please indicate attendance on the registration form)
Private AEP® Designee and EPLS Certificant Session
Discussion with Philip B. Cubeta, CLU®, ChFC®, MSFS, CAP®, AEP®
Keeler & Associates, LLP
In this interactive session, you will see and hear 1-3 minute videos of clients at a turning point. You will be asked your thoughts on whether it makes sense as an “English language rule” to this each may do either or both, and our best effort and can be quite helpful with our work.

The Accredited Estate Planner® Designation Program from A - Z
Attend to learn more about attaining the AEP® designation; this session will provide an overview of the program and the perfect opportunity to have your questions answered by the experts at NAEP.

Friday, November 17, 2017
7:00 am - 8:00 am
Breakfast with Exhibitors
8:00 am - 8:15 am
Opening Remarks
9:15 am - 9:25 am
Tax-Efficient Drawdown Strategies During Retirement
Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA
RSM US LLP
Although the focus of financial planning for retirement has always been focused on maximizing wealth accumulation, the focus of a client’s retirement date, managing assets after retirement to income and capital gains and losses which would otherwise be imposed by the trust investor’s state of domicile. In addition, such trusts have uses in certain asset protection strategies and are necessary for certain federal income tax minimization strategies. This presentation will detail the uses as well as the underlying rules that must be followed in order to receive the desired results.

1:15 pm - 2:15 pm
Current Issues in Estate & Gift Tax Audits and Litigation
John W. Porter, B.B.A., J.D. (Distinguished)
Baker & Hostetler LLP
This presentation will address a number of current audit and litigation issues from the perspective of a seasoned litigator who works with the IRS on a daily basis. The discussion will also include a requested analysis of the transfer of hard-to-value assets (including the section 2704 Proposed Regulations), formulas clauses, GRATS, BERTS, tax return preparation issues, privilege issues, and related tax penalty issues.

1:20 pm - 2:20 pm
How to Stop Grants and Areas Lead to Ethical Lapses
Dasheen Mathur, North Carolina State University
We all have heard about “the slippery slope.” Truth be told, the slope is not slippery at first. If it were, we would feel it and catch ourselves. The hard truth is that these first steps into the grey areas are harmless. This presentation will focus on developing the delegation skills we need to recognize the phases of the process and make the risks we take without ethics testing into grey walking.

9:45 am - 9:55 am
Estate Planning Hall of Fame® Induction Ceremony & Hartman Axley Lifetime Service Award Presentation
9:45 am - 10:15 am
Luncheon with Exhibitors

12:00 pm - 1:20 pm
Luncheon with Exhibitors

1:20 pm - 2:20 pm
Inter-Generational Gift Trusts (some Complete; some Not for (state and Federal) Income Tax Minimization
William D. Locklin, J.D. (Distinguished)
Wilson Elser
Inter-vivos non-grantor trusts domiciled in states which permit self-settled inter-vivos trusts do not reduce income taxes on accumulated trust income, in most cases, eliminate state income taxes on portfolio income and capital gains and losses which would otherwise be imposed by the trust investor’s state of domicile. In addition, such trusts have uses in certain asset protection strategies and are necessary for certain federal income tax minimization strategies. This presentation will detail the uses as well as the underlying rules that must be followed in order to receive the desired results.

2:35 pm - 3:25 pm
Planning for Privacy in a Public World: The Ethics and Mechanics of Protecting your Client's Personal and Professional Security
John J. Bergner, JD & Jeff Chadwick, JD
Wilson Elser
As public access to information increases, clients are seeking solutions to protect their privacy and personal security. This presentation will discuss how the professional advisor can structure estate plans and financial transactions in a confidential manner and protect clients against physical and cyber attacks.

3:25 pm - 4:35 pm
Grab & Go Breakfast Break

4:35 pm - 4:45 pm
Income Taxation of Trusts & Estates – Ten Things Estate Planners Need to Know
Mickey R. Davis, JD & Melissa J. Williams, JD, LL.M.
Davis & Winnick, PLLC
Income taxes continue to drive how estate planners advise clients to structure their plans. Income taxes that arise during estate or trust administration are just as important. Stagger through the critical aspects of Subchapter J, including what is income, ORL, and the grantor trusts rules.

4:45 pm - 5:45 pm
Closing Remarks

National Association of Estate Planners & Councils 2017 Awards Ceremony

Friday, November 17th, 2017 at 9:15 am
Recognizing Excellence in Estate Planning & Service to the Profession

Estate Planning Hall of Fame® Entrants
Vincent M. D’Addona
Donald D. Janzen
R. Hugh Magill
Edward Mendlewitz
John Bergner
John J. Scroggin

Hartman Axley Lifetime Service Award Recipient
Jonathan G. Blattmachr

Schedule and timing subject to change