

Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders

November 6 - 9, 2018 · Ft. Lauderdale, Florida

Tuesday, November 6th

Pre-Conference Sessions for Council Leaders

Council volunteer leaders and paid executives* should attend the entire day of activities

7:30 am Continental Breakfast

8:30 am "Meet Your Association" Learning Pods and Sharing Sessions

9:15 am Private Council Executive Session with NAEPCs Webmaster

11:00 am NAEPC Annual Meeting, Awards Ceremony & Leader Luncheon

12:50 pm Learning Pods and Sharing Sessions Resume

5:00 pm Opening Reception for all Conference Attendees & Registered Companions

6:00 pm Private Council Executive Dinner



***Special Note for Council Executives:** Your sessions continue through 12:00 pm on Wednesday, November 7th.

Premier Sponsor



Partner Sponsor



Principal Sponsors



Wednesday, November 7th

Technical Education

10th Annual 2-Mile Fun Run & Walk, 5:45 am

Concurrent 7:00 am Bonus Sessions

From Novelty to Necessity - Pragmatic Social Media for Law Firms

Sean Sands
provided by FindLaw, part of Thomson Reuters

Life Settlements - The Value Proposition

Matthew Sheridan
provided by Berkshire Settlements, Inc.

199A for Trusts and Estates

Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA

How Non-Grantor Trusts Can Help Reduce Income Taxes for You and Your Clients

Jonathan G. Blattmachr, Esq., AEP® (Distinguished)

Collaborative Planning Opportunities Created through the Valuation of Life Insurance

Todd A. Fithian & Jon B. Mendelsohn
Sponsored General Session provided by Ashar Group, LLC

The Social Media Thicket:

Social Media Issues for Estate Planners
Michael H. Rubin, JD

Stupid Charitable Tricks and Common Planning Mistakes

Ramsay H. Slugg, JD

Succession Planning for the Closely-Held Business

Jerome M. Hesch, MBA, JD, AEP® (Distinguished)

Reception for all Conference Attendees & Registered Companions

Thursday, November 8th

7:00 am Bonus Session

Why the Bridge Trust® is Superior to a Foreign Only or Domestic Only Asset Protection Trust
Douglass Lodmell, JD, LL.M.

provided by Lodmell & Lodmell, P.C. / Asset Protection Council®

Hartman Axley Lifetime Service Award Presentation to S. Stacy Eastland, JD, AEP® (Distinguished)

Income Tax Aspects of Trusts and Estates

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

Estate Planning Hall of Fame® Ceremony honoring

Hartman Axley Charles A. Redd
Amy Morris Hess A. Charles Schultz
Stephanie Loomis-Price

Concurrent Sessions (choices requested)

11:35 am - 12:35 pm & 1:35 pm - 2:35 pm

Reading, Interpreting and Drafting Trust Distribution Provisions that Work: Say What You Mean and Mean What You Say
Leslie Kiefer Amann, JD, AEP®, TO

11:35 am - 12:35 pm & 1:35 pm - 2:35 pm

Gun Trusts and Challenging Assets - Is it Contraband?
C. Dennis Brislawn, Jr., JD, AEP®

11:35 am - 12:35 pm

Late Elections Under Section 9100: How Does the IRS Spell Relief?
Beth Shapiro Kaufman, JD

1:35 pm - 2:35 pm

Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy
Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®

Thursday, November 8th

Continued...

Exploiting the 2017 Tax Act: Creative New Federal and State Income Tax Savings Opportunities

Steven J. Oshins, JD, AEP® (Distinguished)

Optional Concurrent Sessions · 4:15 pm

Private Event for active Accredited Estate Planner® Designees and Estate Planning Law Specialist Certificants

Accredited Estate Planner® Designation A - Z
Learn about the AEP® designation from the experts at NAEPC

Getting Started on the Path to Specialization with the Estate Planning Law Specialist Certification
For actively-licensed attorneys who are interested in learning about the EPLS certification

Friday, November 9th

Estate Planning Current Developments and Hot Topics

Steve R. Akers, JD, AEP® (Distinguished)

Putting It On & Taking It Off: Managing Tax Basis Today (For Tomorrow)

Paul S. Lee, JD, LL.M. (taxation), AEP® (Distinguished)

Don't Worry, Retire Happy:

Seven Steps to Retirement Security
Tom Hegna, CLU®, ChFC®, CASL®

Sessions conclude at 12:15 pm



www.NAEP.org

General Information

HEADQUARTERS

HOTEL & LODGING

NAEPC is delighted to host its 55th Annual Conference at **MARRIOTT HARBOR BEACH RESORT & SPA** in Ft. Lauderdale, Florida. The NAEPC room rate is \$245 for a standard room with an optional Resort Amenity Package of \$25/night (single/double occupancy, exclusive of taxes and fees). Additional room and suite options are available. Reservations must be made by 10/12/18 and can be made by calling 954-525-4000 and referencing group code "NAEPC" or at www.NAEPC.org/conference.

CONTINUING

EDUCATION CREDIT

Continuing education credit will be available nationwide for estate planning-related disciplines to those who attend the Wednesday, 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.** Learn more at www.NAEPC.org/conference.

COMPANION PROGRAM

Wednesday, November 7th

Florida Everglades Outing

9:00 am – 1:00 pm

Enjoy an airboat ride, alligator rescue show and a photo-op in one of the most unique eco-systems in the world.

REFUND

POLICY

Cancellations 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 09/14/18. Registrants who cancel between 9/15/18 and 10/19/18 will forfeit a \$100 administrative fee. No refunds will be granted after 10/19/18. Requests to transfer registrations to another individual will be accommodated.

REGISTRANT

DISCOUNTS & OTHER FEES

- \$50 Early Bird Discount *register on or before 9/14/18*
- \$50 Active AEP® designee or EPLS certificant
- \$50 Florida Council Discount
- \$100 NAEPC Volunteer Discount *active member of any committee of NAEPC*
- \$50 Late Fee after 10/19/18



Thursday, November 8th

Art on Las Olas

9:30 am – 2:30 pm

This tour includes three gallery stops and a bit of time to explore Las Olas Boulevard, a location teeming with history and culture.

Registration • Register Online at www.NAEPC.org/conference

Last Name	First Name & Middle Initial
Professional Designations	Nickname for Name Badge
Company Name	Street Address
City, State & Zip	Telephone Number
Email Address	Affiliated Local Council Membership
Emergency Contact Name & Telephone Number	
Companion Last Name, First Name, Nickname for Name Badge	
Companion Street Address, City, State & Zip	
Companion Telephone	Companion Email

___ **Annual Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders • \$1,175**
Registration fee includes the pre-conference sessions for council leaders and technical education sessions, presentation material, conference breakfasts, luncheons and receptions. Council Executives (paid staff) are eligible to attend the sessions at no charge.

___ **Annual Advanced Estate Planning Strategies Conference • \$1,075 member / \$1,300 non-member**
Registration fee includes technical education sessions, presentation material, conference breakfasts, luncheons and receptions.

Please check all events you will be attending and circle your preferred breakout sessions

- | | |
|--------------------------------------------------------|--------------------------------------------------------------|
| ___ Tuesday Opening Reception · 5:00 pm | ___ Thursday Private AEP® / EPLS Session · 4:15 pm <i>or</i> |
| ___ Wednesday Fun Run · 5:45 am | ___ Thursday AEP® A - Z · 4:15 pm <i>or</i> |
| ___ Wednesday Reception · 5:00 pm | ___ Thursday EPLS Informational Session · 4:15 pm |
| Breakout Session #1 Choice · Amann / Brislaw / Kaufman | Breakout Session #2 Choice · Amann / Brislaw / Miller |

___ **Companion • \$475**
Available to guests of primary registrants, registration fee includes conference breakfasts, tours, and receptions.

Please check all events you will be attending

- | | |
|-----------------------------------------|------------------------------|
| ___ Tuesday Opening Reception · 5:00 pm | ___ Wednesday Companion Tour |
| ___ Wednesday Fun Run · 5:45 am | ___ Thursday Companion Tour |
| ___ Wednesday Reception · 5:00 pm | |

I acknowledge that I have read, completely understand, and agree to abide by the continuing education and cancellation policies, and code of conduct found at www.NAEPC.org/content/conduct.

If paying by credit card: Visa / MC / Amex # _____ Expiration: ____ / ____

Signature: _____