Tuesday, November 6, 2018 – Schedule of Events

7:30 am - 8:30 am  Breakfast (Leader / Executive Track)
8:30 am - 9:10 am  Learning Pod #1 (Leader / Executive Track)
9:15 am - 9:55 am  Learning Pod #2 (Leader Track)
9:15 am - 10:50 am  Private Session with the NAEPC Webmaster (Executive Track)
9:55 am - 10:15 am  Conversation Break
10:15 am - 10:50 am  Learning Pod #3 (Leader Track)
11:00 am - 12:45 pm  NAEPC Annual Meeting, Luncheon & Presentation of Council of Excellence Awards (Leader / Executive Track)
12:50 pm - 1:30 pm  Learning Pod #4 (Leader / Executive Track)
1:35 pm - 2:15 pm  Learning Pod #5 (Leader / Executive Track)
2:15 pm - 2:45 pm  Conversation Break
2:45 pm - 3:45 pm  Council by Size Sharing Session (Leader / Executive Track)
3:45 pm - 4:00 pm  Conversation Break
4:00 pm - 5:00 pm  Council by Size Sharing Session Resumes (Leader / Executive Track)
5:00 pm - 6:00 pm  Opening Reception for All Attendees & Registered Companions (Leader / Executive Track)
6:00 pm  Private Council Executive Dinner (Executive Track)
Pre-Conference Sessions for Estate Planning Council Leaders & Executives

Tuesday, November 6, 2018 – Schedule of Events

7:30 am - 8:30 am  Breakfast (Leader / Executive Track)
8:30 am - 9:10 am  Learning Pod #1 (Leader / Executive Track)
9:15 am - 9:55 am  Learning Pod #2 (Leader Track)
9:15 am - 10:30 am  Private Session with the NAEPIC Webmaster (Executive Track)
9:55 am - 10:15 am  Conversation Break
10:15 am - 10:50 am  Learning Pod #3 (Leader Track)
11:00 am - 12:45 pm  NAEPIC Annual Meeting, Luncheon & Presentation of Council of Excellence Awards (Leader / Executive Track)
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1:35 pm - 2:15 pm  Learning Pod #5 (Leader / Executive Track)
2:15 pm - 2:45 pm  Conversation Break
2:45 pm - 3:45 pm  Council by Size Sharing Session (Leader / Executive Track)
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Companion Program & Tours
The companion program is offered as an enhancement to the annual conference for those who will be attending with a registrant, but will not be taking advantage of the educational sessions. The registration fee includes conference receptions and breakfasts on the day of each tour, the outings, and the friendship! Companion Package $475
Visit www.naepc.org for a detailed description of each tour.

Concurrent Sponsor Bonus Sessions
Life Settlements - The Value Proposition
Matthew Silverman provided by ReVEC Settlements, Inc.
From Necessity to Necessity - Pragmatic Social Media for Law Firms
Susan Sands provided by FindLaw, part of Thomson Reuters
8:00 am - 8:30 am Welcome & Opening Remarks
8:30 am - 9:30 am 1956 for Trusts and Estates
Robert S. Koebbel, CPA/PFS, MST, AEP® (Distinguished), COMA Koebbel & Associates, LLP

Recognizing Excellence in Estate Planning & Service to the Profession
2018 Estate Planning Hall of Fame® Entrants
Hartman Axley, CLU®, CFP®, JD, LLM®, MSFS, RHU
Amy Morris Hess, JD
Stephanie Loomis-Price, JD
Charles A. Reidl, JD
A. Charles Schultz, JD
2018 Hartman Axley Lifetime Service Award Recipient
S. Stacy Eastland, JD, AEP® (Distinguished)
Join us for the recognition ceremonies on Thursday, November 8, 2018

Thursday, November 8, 2018
8:30 am - 7:45 am Breakfast with Exhibitors
7:00 am - 7:45 am Concurrent Sponsor Bonus Sessions
Why the BridgeTrust® is Superior to a Foreign-Only or Domestic-Only Asset Protection Trust
Douglas Lohmelt, JD, LLM, provided by Lohmelt & Lohmelt, P.C. / Asset Protection Council®
Sold a Dream, Woke Up in a Nightmare: Educating Your Clients about a Timeshare’s True Costs
Chuck McDonnell provided by Wesley Financial Group, LLC
7:50 am - 8:15 am Opening Remarks
8:15 am - 8:30 am Presentation of Hartman Axley Lifetime Service Award
8:30 am - 9:30 am Income Tax Aspects of Trusts and Estates
Samuel A. Donaldson, JD, LLM, AEP® (Distinguished)
Georgia State University College of Law
9:30 am - 10:00 am Estate Planning Hall of Fame® Induction Ceremony
10:00 am - 10:30 am Break with Exhibitors
10:30 am - 11:30 am How Congress Improves Asset Protection Trust Strategies & Protecting Your Trust
Louis S. Harrison, JD
Harrison & Held, LLP
11:35 am - 12:35 pm Concurrent Breakout Sessions (pre-registration requested)
Reading, Interpreting and Drafting Trust Distribution Provisions That Work: Say What You Mean and Mean What You Say
Leslie Ketter Amann, JD, AEP®, TO Sardess Trust Company LBA
A Firearm as a Special Asset: How to Avoid an Accidental Felony
C. Devon Brinkman, JD, AEP®
Doran Hahn, P. S.
Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy
Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®
BRM Medex

56th Annual NAEPF Advance Estate Planning Strategies Conference Schedule of Events
Tuesday, November 6, 2018
4:45 pm - 5:15 pm Companion Registrant Meet & Greet
5:00 pm - 6:00 pm Opening Reception with Exhibitors for All Conference Attendees and Registered Companions
Wednesday, November 7, 2018
5:45 am 2-Mile Fun Run & Walk (all fitness levels welcome, pre-registration requested)
5:00 am - 5:45 am 2-Mile Fun Run & Walk (all fitness levels welcome, pre-registration requested)
5:45 am - 7:00 am Breakfast with Exhibitors
7:00 am - 7:45 am 2-Mile Fun Run & Walk (all fitness levels welcome, pre-registration requested)
7:45 am - 8:00 am Breakfast with Exhibitors
8:00 am - 8:30 am Opening Remarks
8:30 am - 9:30 am Southern Media Network: Social Media Issues for Estate Planners
Michael H. Rublin, JD
Mckinney Stoller
2:30 pm - 3:00 pm Stupid Charitable Tricks and Common Planning Mistakes
Randolph H. Sails, JD
U.S. Trust Bank of America Private Wealth Management
3:30 pm - 4:00 pm Break with Exhibitors
4:00 pm - 5:00 pm Southern Media Network: Social Media Issues for Estate Planners
Michael H. Rublin, JD
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4:00 pm - 5:00 pm Southern Media Network: Social Media Issues for Estate Planners
Michael H. Rublin, JD
Mckinney Stoller
5:00 pm - 6:00 pm Reception with Exhibitors for All Conference Attendees and Registered Companions
6:00 pm - 7:00 pm Dinner with Exhibitors
8:00 pm - 9:30 pm Dinner with Exhibitors
9:30 pm - 12:00 am Dinner with Exhibitors

Friday, November 9, 2018
7:30 am - 8:30 am Breakfast
8:30 am - 8:45 am Opening Remarks
8:45 am - 9:50 am Estate Planning Current Developments and Hot Topics
Steve R. Akers, JD, AEP® (Distinguished)
Bessemer Trust Company, N.A.
9:50 am - 10:55 am Putting It On & Taking It Off: Managing Tax Basis Today (For Tomorrow)
Paul S. Lee, JD, LLM, (taxation), AEP® (Distinguished)
Northern Trust
10:55 am - 11:10 am Break
11:10 am - 12:10 pm Dinner with Exhibitors

Companion Program & Tours
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Thursday, November 8, 2018
8:30 am - 12:00 pm Council Executive Development Session
9:30 am - 10:30 am How Effective Uses of Non-Grantor Trusts for Individual Taxpayers
Jonathan G. Biltzmaier, Esq., AEP® (Distinguished)
Pioneer Wealth Partners, LLC
10:30 am - 11:00 am Break with Exhibitors
11:00 am - 12:00 pm Collaborative Planning Opportunities Created Through the Valuation of Life Insurance
Lisa R. Featherngill, CFP®, Todd A. Fitzner, Todd S. Healy, MSF, CLU®, CFP®, AEP®, CAP®, Jamie L. Mendelsohn, and Jon B. Mendelsohn
session provided by Agyer Group, LLC
12:00 pm - 1:30 pm Lunch with Exhibitors
1:30 pm - 2:30 pm The Social Media Thicket: Social Media Issues for Estate Planners
Michael H. Rublin, JD
Mckinney Stoller
2:30 pm - 3:30 pm Stupid Charitable Tricks and Common Planning Mistakes
Randolph H. Sails, JD
U.S. Trust Bank of America Private Wealth Management
3:30 pm - 4:00 pm Break with Exhibitors
4:00 pm - 5:00 pm Southern Media Network: Social Media Issues for Estate Planners
Michael H. Rublin, JD
Mckinney Stoller
5:00 pm - 6:00 pm Reception with Exhibitors for All Conference Attendees and Registered Companions
Strategies Conference Schedule of Events

Tuesday, November 6, 2018

8:30 am - 12:00 pm
Conference Executive Development Session (Executive Track)

9:30 am - 10:30 am
New Effective Uses of Non-Grantor Trusts for Individual Taxpayers
Jonathan G. Baltmanich, Esq., AE® (Distinguished)
Pioneer Wealth Partners, LLC

10:30 am - 11:00 am
Break with Exhibitors

11:00 am - 12:00 pm
Collaborative Planning Opportunities Created through the Valuation of Life Insurance
Lisa R. Featherhill, CFP®, Todd A. Fitzian, Todd S. Healy, MSW, CLU®, DCFO®, AE®, CFP®, Jamie L. Mondrosch, and Jon B. Mendelsohn

Session provided by Axler Group, LLC

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

1:30 pm - 2:30 pm
The Social Media Thicket: Social Media Issues for Estate Planners
Michael H. Rubin, JD
McKinley Stoughton

3:00 pm - 4:00 pm
Stupid Charitable Tricks and Common Planning Mistakes
Randall H. Stelz, JD
U.S. Trust Bank of America Private Wealth Management

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

4:00 pm - 5:00 pm
SUCCESS Planning for the Closely-Held Business
Jerome M. Hesch, MBA, JD, AE® (Distinguished)

5:00 pm - 6:00 pm
Reception with Exhibitors for All Conference Attendees and Registered Companions

6:30 am - 7:45 am
Breakfast with Exhibitors

7:00 am - 7:45 am
Concurrent Sponsor Breakout Sessions
*Why the Bridge Trust®* is Superior to a Foreign-Only or Domestic-Only Asset Protection Trust
Douglas Lohmiller, JD, LL.M, provided by Lohmiller & Lohmiller, P.C. / Asset Protection Council®

Sold a Dream, Woke Up in a Nightmare: Educating Your Clients about a Timeshare's True Costs
Chuck McDowell
provided by Wickersham Financial Group, LLC

7:50 am - 8:15 am
Opening Remarks

8:15 am - 8:30 am
Presentation of Hartman Axley Lifetime Service Award

8:30 am - 9:30 am
Income Tax Aspects of Trusts and Estates
Samuel A. Donaldson, JD, LL.M., AE® (Distinguished)
Georgia State University College of Law

9:30 am - 10:00 am
Estate Planning Hall of Fame® Induction Ceremony

10:00 am - 10:30 am
Break with Exhibitors

10:30 am - 11:30 am
New Approaches to Asset Protection Trust Strategies & Protecting Your Trust
Louis S. Harrisson, JD
Harrison & Held, LLP

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Concurrent Breakout Sessions (pre-registration requested)
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Leslie Ketter Amann, JD, AE®, TO
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A Firearm as a Special Asset: How to Avoid an Accidental Felony
C. Dennis Brislawn, Jr., JD, AE®, TO
Oseran Hahn, P.S.

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

12:35 pm - 1:30 pm
Lunch with Exhibitors

1:35 pm - 2:30 pm
Accredited Estate Planner® Designation from A-2
This session offers an overview of the AE® designation program and requirements and provides the perfect opportunity to have your questions answered by the experts at NAEP.

1:30 pm - 2:30 pm
Inspirational Session for Active Accredited Estate Planner® Designees and Estate Planning Law Specialist Certificants
The Strength to be Unstoppable – Lessons in Working Together from Roseann Sdoia, Boston Marathon Bombing Survivor

Getting Started on the Path to Attorney Specialization with the Estate Planning Law Specialist Certification
This session is available to actively licensed attorneys who wish to learn more about the Estate Planning Law Specialist certification program.

2:35 pm - 3:05 pm
Supplemental Concurrent Sessions (pre-registration requested)

3:05 pm - 4:05 pm
Exploiting the 2017 Tax Act: Creative New Federal and State Income Tax Savings Opportunities
Steven J. Oates, JD, AE® (Distinguished)
Oates & Associates, LLC

4:15 pm - 5:15 pm

Friday, November 9, 2018

7:30 am - 8:30 am
Breakfast

8:30 am - 8:45 am
Opening Remarks

8:45 am - 9:50 am
Estate Planning Current Developments and Hot Topics
Steve R. Akers, JD, AE® (Distinguished)
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9:50 am - 10:55 am
Putting It On & Taking It Off: Managing Tax Basis Today (For Tomorrow)
Paul S. Lee, JD, LL.M. (taxation), AE® (Distinguished)
Northern Trust

10:55 am - 11:10 am
Break

11:10 am - 12:10 pm
Don’t Worry Retire Happy: Seven Steps to Retirement Security
Tony Vega, CLU®, CFP®, CASL®

12:10 pm - 12:15 pm
Closing Remarks