56th Annual NAEPC Advanced Estate Planning Strategies Conference General Information

56th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders

November 5-8, 2019
The Cosmopolitan of Las Vegas
Las Vegas, Nevada

Brought to you by the National Association of Estate Planners & Councils

Preregistration Details

Registration Fees

Early Regular Late
Member $1175 $1225 $1275
Non-Member $1170 $1220 $1270

Pre-Conference Sessions for Council Leaders

<table>
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<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:00 am – 8:00 am</td>
<td>Breakfast (Leader / Executive Track)</td>
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<tr>
<td>8:00 am – 8:40 am</td>
<td>Learning Pod #1 (Leader / Executive Track)</td>
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<tr>
<td>8:50 am – 9:30 am</td>
<td>Learning Pod #2 (Leader / Executive Track)</td>
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<tr>
<td>8:50 am – 10:30 am</td>
<td>Executive Session with Webmaster (Executive Track)</td>
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<tr>
<td>9:30 am – 9:50 am</td>
<td>Conversation Break</td>
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<tr>
<td>9:50 am – 10:30 am</td>
<td>Learning Pod #3 (Leader Track)</td>
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<td>10:30 am – 10:45 am</td>
<td>Conversation Break</td>
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<tr>
<td>10:45 am – 12:20 pm</td>
<td>Annual Meeting &amp; Awards Luncheon (Leader / Executive Track)</td>
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<tr>
<td>12:30 pm – 1:30 pm</td>
<td>Learning Pod #4 (Leader / Executive Track)</td>
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<tr>
<td>1:40 pm – 2:30 pm</td>
<td>Learning Pod #5 (Leader / Executive Track)</td>
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<tr>
<td>2:30 pm – 2:45 pm</td>
<td>Conversation Break</td>
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<tr>
<td>2:45 pm – 3:45 pm</td>
<td>Council by Size Sharing Session (Leader / Executive Track)</td>
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<tr>
<td>3:45 pm – 4:00 pm</td>
<td>Conversation Break</td>
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<tr>
<td>4:00 pm – 5:00 pm</td>
<td>Opening Reception with Exhibitors for All Attendees &amp; Registered Companions</td>
</tr>
<tr>
<td>5:00 pm – 6:00 pm</td>
<td>Private Council Executive Dinner (Executive Track)</td>
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HOW TO REGISTER

Register at www.naepc.org/conference or contact the NAEPC office for a copy of the conference registration form.

Discounts

Active NAEPC or IPSLS $50
Nevada Council Member $30
NAEPC Volunteer $100

Cancellation

A full refund will be granted for cancellations emailed to conference@naepc.org on or before 10/18/19. No refunds will be granted after 10/18/19.

Continuing Education Credit

The Advanced Estate Planning Strategies Conference is approved for continuing education credit (pending approval). Life insurance professionals must attend all technical education sessions on Tuesday, Wednesday, Thursday, and Friday to receive continuing education credit. Continuing education credit is not available, nor is insurance credit for single day attendance.

For complete details and approval status, visit www.naepc.org/conference.

We are grateful for the support of the 56th Annual Advanced Estate Planning Strategies Conference Sponsors, including:

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Visit www.naepc.org/conference for a detailed description of each Learning Pod.

Pre-Conference Sessions for Council Leaders & Executives

Tuesday, November 5, 2019 – Schedule of Events

7:00 am – 8:00 am
8:00 am – 8:40 am
8:50 am – 9:30 am
8:50 am – 10:30 am
9:30 am – 9:50 am
9:50 am – 10:30 am
10:30 am – 10:45 am
10:45 am – 12:20 pm
12:30 pm – 1:30 pm
1:40 pm – 2:30 pm
2:30 pm – 2:45 pm
2:45 pm – 3:45 pm
3:45 pm – 4:00 pm
4:00 pm – 5:00 pm
5:00 pm – 6:00 pm
6:00 pm

Breakfast (Leader / Executive Track)
Learning Pod #1 (Leader / Executive Track)
Learning Pod #2 (Leader / Executive Track)
Executive Session with Webmaster (Executive Track)
Conversation Break
Learning Pod #3 (Leader Track)
Conversation Break
Annual Meeting & Awards Luncheon (Leader / Executive Track)
Learning Pod #4 (Leader / Executive Track)
Learning Pod #5 (Leader / Executive Track)
Conversation Break
Council by Size Sharing Session (Leader / Executive Track)
Conversation Break
Council by Size Sharing Session Resumes (Leader / Executive Track)
Opening Reception with Exhibitors for All Attendees & Registered Companions
Private Council Executive Dinner (Executive Track)

Sessions for executives continue through noon on Wednesday, November 6, 2019 – please make travel plans accordingly. Council executives are always eligible to attend the conference with the registration fee waived.
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Pre-Conference Sessions for Council Leaders & Executives

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Tuesday, November 5, 2019 – Schedule of Events

7:00 am – 8:00 am Breakfast (Leader / Executive Track)

8:00 am – 8:40 am Learning Pod #1 (Leader / Executive Track)

8:50 am – 9:30 am Learning Pod #2 (Leader / Executive Track)

8:50 am – 10:30 am Executive Session with Webmaster (Executive Track)

9:30 am – 9:50 am Conversation Break

9:50 am – 10:30 am Learning Pod #3 (Leader Track)

10:30 am – 10:45 am Conversation Break

10:45 am – 12:20 pm Annual Meeting & Awards Luncheon (Leader / Executive Track)

12:30 pm – 1:30 pm Learning Pod #4 (Leader / Executive Track)

1:40 pm – 2:30 pm Learning Pod #5 (Leader / Executive Track)

2:30 pm – 2:45 pm Conversation Break

2:45 pm – 3:45 pm Conversation Break

3:45 pm – 4:00 pm Conversation Break

4:00 pm – 5:00 pm Council by Size Sharing Session (Leader / Executive Track)

5:00 pm – 6:00 pm Opening Reception with Exhibitors for All Attendees & Registered Corporates

6:00 pm Private Council Executive Dinner (Executive Track)
Tuesday, November 5, 2019

8:00 am - 12:00 pm Council Executive Development Session (Executive Track)
9:30 am - 10:30 am Life Settlement Legal and Ethical Responsibility
   James L. Mendelsohn, Jason T. Mendelsohn, & Jon R. Mendelsohn
   provided by Amlow Group, LLC
10:30 am - 11:00 am Break with Exhibitors
11:00 am - 12:00 pm Traps for the Unwary – Estate Planners’ Prescriptions and Conundrums
   Richard A. Oehlsch, JD, LL.M., MBA, AEP® (Distinguished)
   Oehlsch & Associates, LLC
   Jeffrey Schoenbaum, JD, AEP® (Distinguished)
   Vanderbilt University Law School
12:00 pm - 1:30 pm Lunch with Exhibitors
1:30 pm - 2:30 pm Ethics of Negotiation
   Michael H. Rubin, JD
   McKinley Stafford
2:30 pm - 3:30 pm Financial Issues for the Recent Widow or Widow(er)
   Jeremiah W. Creath, IV, JD, LL.M. (Bankruptcy Law), AEP® (Distinguished)
   BNY Mellon Wealth Management
3:30 pm - 4:00 pm Break with Exhibitors
4:00 pm - 5:00 pm Valuation: How to Read and Critique an Appraiser’s Appraisal
   Stephanie Loomis-Price, JD, AEP® (Distinguished)
   McKinley Stafford
5:00 pm - 6:30 pm Reception with Exhibitors for All Conference Attendees and Registered Companions

Wednesday, November 6, 2019

8:00 am - 8:30 am Welcome & Opening Remarks

7:00 am - 7:45 am Concurrent Sponsor Bonus Sessions
Small Business Gifts to CRTs and DAF’s
   Gregory W. Baker, JD, CFP®, CFP®, CAP®
   provided by NexFAS
Timeshares and Estate Planning
   Chuck McDowell
   provided by Winkley Financial Group, LLC
8:00 am - 8:30 am Estate Planning Tips and Nuggets
   Martin M. Sheinkman, CPA/PPA, MBA, JD, AEP® (Distinguished)
   Sheinkman Law
8:30 am - 9:30 am Reception with Exhibitors for All Conference Attendees and Registered Companions

Thursday, November 7, 2019

6:30 am - 7:45 am Breakfast with Exhibitors
7:00 am - 7:45 am Sponsor Bonus Sessions
   Fiduciary Oil & Gas Management Risk Mitigation
   Wes Treaday
   provided by Farmers National Company
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. Donabedian, JD, LL.M., 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 Beyond the Numbers: Understanding Forms 1041 / 706 / 709
   Robert S. Stavola, CPA/PPA, MST, AEP® (Distinguished), COPA
   Kester & Associates, LLP
11:30 am - 12:30 pm Impact of the Tax Cuts and Jobs Act on Life Insurance Planning
   Lee A. Stavola, MD, CLU®, AEP® (Distinguished)
   Stern Stavola - Z, Inc.
12:30 pm - 1:30 pm Lunch with Exhibitors
1:35 pm - 2:35 pm Concurrent Breakout Sessions
   Traps for the Unwary – Estate Planners’ Prescriptions and Conundrums, a Deeper Dive
   Richard A. Oehlsch, JD, LL.M., MBA, AEP® (Distinguished)
   Oehlsch & Associates, LLC
   Jeffrey Schoenbaum, JD, AEP® (Distinguished)
   Vanderbilt University Law School
   Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy
   Justin T. Miller, JD, LL.M. (Bankruptcy Law), AEP® (Distinguished)
   BNY Mellon
   Minority Report: Planning for Clients with Minor Children
   Sarah Moore Johnson, JD
   Bernstein Mooney LLC
2:35 pm - 3:55 pm Closed Remarks
3:55 pm - 4:20 pm Final Awards and Ceremonies

Accredited Estate Planner® Designation from A - Z
For those interested in learning more about the AEP® designation, this session offers the perfect opportunity to have your questions answered by the experts at NAEP®.

Estate Planning Law Specialist Certification
This session is for actively-licensed attorneys who are interested in learning more about the EPLS certification, the only national board certification in estate planning.

Friday, November 8, 2019

7:30 am - 8:30 am Breakfast & Supplemented Concurrent Breakout Sessions
Accredited Estate Planner® Designation from A - Z
For those interested in learning more about the AEP® designation, this session offers the perfect opportunity to have your questions answered by the experts at NAEP®.

Estate Planning Law Specialist Certification
This session is for actively-licensed attorneys who are interested in learning more about the EPLS certification, the only national board certification in estate planning.

8:30 am - 8:45 am Opening Remarks and BINGO Drawing
8:45 am - 9:50 am Estate Planning and Trust Management for a Brave New World: It’s all in the Family... What’s a Family? R. Hugh Magle, JD, AEP® (Distinguished)
   Northern Trust Corporation
9:50 am - 10:55 am Charitable Giving with Retirement Accounts: Strategies, Traps and Solutions
   Christopher R. Hoyt, JD, AEP® (Distinguished)
   University of Missouri - Kansas City School of Law
10:55 am - 11:10 am Closing Remarks

At the 2019 Conference in Las Vegas, the NAEP® (Accredited Estate Planner®) program celebrated its 20th anniversary. The program has been responsible for the education of over 70,000 estate planning professionals over the last two decades. The NAEP® designation is the only national board certification in estate planning.

Visit www.naepc.org/conference for a detailed description of each tour.

57th Annual NAEP® Advanced Estate Planning Strategies Conference
November 3 - 6, 2020
   Ft. Lauderdale, Florida
   Marriott Harbor Beach Resort & Spa
56th Annual Advanced Estate Planning Strategies Conference February 3, 2020
Marriott Harbor Beach Resort & Spa

Recognizing Excellence in Estate Planning & Service to the Profession
2019 Estate Planning Hall of Fame® Entrants
Jay D. Adkisson, JD
Robert G. Ash, CPA/PTFA, MBA, AEP® (Distinguished)
Richard A. Daniels, JD, LL.M., MBA, AEP® (Distinguished)
Jeffrey Schoenbrand, JD, AEP® (Distinguished)
Vanderbilt University Law School
BNY Mellon Wealth Management

Concurrent Breakfast Sessions
9:30 am - 10:30 am
Traps for the Unwary – Some Estate Planners’ Proscriptions and Conundrums
Richard A. Daniels, JD, LL.M., MBA, AEP® (Distinguished)
Oskar & Associates, LLC
Jeffrey Schoenbrand, JD, AEP® (Distinguished)
Vanderbilt University Law School

Thursday, November 7, 2019
6:30 am - 7:45 am
Breakfast with Exhibitors
7:00 am - 7:45 am
Sponsor Bonus Session
fiduciary Oil & Gas Management Risk Mitigation
Mary Torres
provided by Farmars National Company
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. Donabedian, JD, LL.M., 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
Impact of the Tax Cuts and Jobs Act on Life Insurance Planning
Lee A. Stawinski, MD, CLU, AEP® (Distinguished), COMA
Keebler & Associates, LLP
11:30 am - 12:30 pm
Income Tax Aspects of Trusts and Estates
Samuel A. Donabedian, JD, LL.M., AEP® (Distinguished)
Richards & Grodsky, CPA/PTFA, MST, AEP® (Distinguished), COMA
Ridley & Associates, LLP
12:30 pm - 1:30 pm
Lunch with Exhibitors
1:35 pm - 2:35 pm
Concurrent Breakfast Sessions
9:30 am - 10:30 am
Traps for the Unwary – Some Estate Planners’ Proscriptions and Conundrums, a Deeper Dive
Richard A. Daniels, JD, LL.M., MBA, AEP® (Distinguished)
Daines & Associates, LLC
Jeffrey Schoenbrand, JD, AEP® (Distinguished)
Vanderbilt University Law School
Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy
Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®
BNY Mellon
Preparing the Next Generation for What’s Ahead
Donna E. Trammell
Besserer Trust
4:15 pm - 5:15 pm
Private Session for Accredited Estate Planner® Designates and Estate Planning Law Specialist Certificants: Lessons from Empty Mansions, A Mystery of Wealth and Loss with Bill Dedman, Pulitzer Prize Winning Journalist
Through the reclusive heiress Huguette Clark owned palatial homes in California, Connecticut, and New York, she led for twenty years in a simple hospital room. Bill Dedman will recount the mysteries of wealth and loss through the eyes of daughter Huguette, who as a young girl held a ticket on the Titanic and as an elderly woman was still living in New York City on 9/11.
Friday, November 8, 2019
7:30 am - 8:30 am
Breakfast & Supplemental Concurrent Breakfast Sessions
Accredited Estate Planner® Designation from A - Z
For those interested in learning more about the AEP® designation, this session offers the perfect opportunity to have your questions answered by the experts at NAEPC.
Getting Started on the Path to Specialization with the Estate Planning Law Specialist Certification
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8:30 am - 8:45 am
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Northern Trust Corporation
9:50 am - 10:55 am
Charitable Giving with Retirement Assets: Strategies, Traps and Solutions
Christopher R. Hoyt, JD, AEP® (Distinguished)
University of Missouri - Kansas City School of Law
10:55 am - 11:10 am
Open & Un-Break
11:10 am - 12:10 pm
Powers of Appointment: Basics, Basics, and Beyond
Terry P. Berry, JD, AEP® (Distinguished)
Wyll, Tarrant & Combs LLP
12:10 pm - 12:15 pm
Closing Remarks