The NAEPC Foundation
1120 Chester Ave., Suite 470
Cleveland, OH 44114

47th Annual Conference
November 17-19, 2010

New!

Continuing education credit requested for attorneys, insurance professionals, accountants, CFP®, CTFA and PACE designees. 14.5 hours of Accredited Estate Planner® designation credits are available!

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PREPARING FOR 2011 AND BEYOND

BACK TO THE FUTURE: Planning for 2011 and Beyond

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The NAEPC Foundation & National Association of Estate Planners & Councils
NOVEMBER 17-19, 2010
SAN DIEGO, CA

Back to the Future: Planning for 2011 and Beyond

The NAEPC Foundation
1120 Chester Ave., Suite 470
Cleveland, OH 44114
Phone: 866-226-2224 • Fax: 216-696-2582 • www.NAEPC.org • conference@NAEPC.org

Prepario Products, LLC
Trusts & Estates

The NAEPC Foundation
1120 Chester Ave., Ste. 470 — Cleveland, OH 44114 — Phone: 866-226-2224 — Fax: 216-696-2582 — www.NAEPC.org — conference@NAEPC.org
Our annual conference is paper-free! Please review General Information tab for details.

November 17-19, 2010 – San Diego, CA — Phone: 866-226-2224 — Fax: 216-696-2582 — www.NAEPC.org — conference@NAEPC.org

CONFERENCE PROGRAM

FRIDAY, NOVEMBER 19, 2010

7:00 am – 8:00 am Breakfast

8:00 am – 9:00 am NAEPC/The NAEPC Foundation Annual Awards Ceremony

9:30 am – 10:30 am Sessions

Oshin/Shirking Outside the Box: Why Participating in the NAEPC volunteer MIGHT Always Be Best for Your Client

Richard A. Oshins, JD, LL.M., MBA, AEP® (Distinction)

A study undertaken in 10 states indicates that wealth planning strategies, many of which are controversial, which should be considered by your clients. Topics include trusts, discounting, DAs, insurance, shifting, and other options.

10:30 am – 11:30 am Break

11:30 am – 12:30 pm Sessions

FPIF: MD Continues Its Attack

Sanford J. Schlesinger, JD, AEP® (Distinction)

MD will discuss current tax issues in which the Internal Revenue Service attempted to rule, or recently ruled, district court is determining the value of gifts in trust and estate purposes or transfers of interests in IFP, and strategies for successfully persuading the service’s argument. The speaker will also discuss current estate tax involving the service’s attack on the issue of the gift tax present interest exclusion in connection with transfers of IFP interest, and recent cases involving到底 further evidence in estate planning documentation.

12:30 pm – 1:30 pm Lunch

1:30 pm – 2:30 pm Sessions

Succession Divided with the New Healthcare Reform Act

Robert J. White, FSA, MAAA, AEP® (Distinguished)

The new federal healthcare legislation contains many issues that impact trusts and your clients. If your clients don’t plan for this location changes, then the tax planning opportunities are over. So how should you encourage your clients to avoid the issues of “beneficially assigned property” under the new tax law?

2:30 pm – 3:30 pm Break

2:50 pm – 3:50 pm Sessions

The ACTEC Commentary on the Model of Professional Conduct

How to Respond to a “Bad Letter”

Bruce R. Ross, JD

As you respond to a “bad letter” of an ethical challenge faced by estate planners in today’s environment. This session goes beyond the basics and discusses the ACTEC model of conduct in its role as we move from the craft to the trade.

3:50 pm – 4:00 pm Break

4:00 pm – 5:00 pm Sessions

Berating Questions (or Even Hotter Answers) About Greater Trusts

Samuel A. Donahue, JD, LL.M.

As you respond to a “bad letter” of an ethical challenge faced by estate planners in today’s environment. This session goes beyond the basics and discusses the ACTEC model of conduct in its role as we move from the craft to the trade.

Saturday, November 20, 2010

7:00 am – 8:00 am Breakfast

8:00 am – 9:00 am NAEPC/The NAEPC Foundation Volunteer Experience

Jackie Robinson, Assistant Director

See general information tab for our details.
Thursday, November 18, 2010

9:00 am – 9:40 am  
Recruitment, Development & Wealth Transfer Planning
Howard M. Zietlow, JD, LL.M., AEP® (Distinguished)
Zietlow will discuss the donor, college, legislative, and legislative history of the last 13 years to outline property transfers and limitations on deductions of interest. In essence, a summary of the major developments will be offered within the context of the law.

9:40 am – 10:20 am  
Recent Developments in Trusts & Estates Tax Planning & Jurisdictional Issues
Richard W. Manns, TO, JD, AEP® (Distinguished)
In his keynote address, Manns will outline the latest issues in the areas of personal trusts, the distribution of personal trusts, testamentary trust validity, and the formation and administration of personal trust entities. For a question and answer session, please click here.

10:20 am – 10:40 am  
Break

10:40 am – 11:00 am  
The Car
The Car

11:00 am – 11:30 am  
Lunch

11:30 am – 12:15 pm  
Recruitment, Wealth Transfer Developments
Jeffrey D. Fisch
Fisch will explain the current economic climate, legislative changes, and how it affects your practice. He will discuss various estate planning instruments and the impact of the recent tax law changes. He will also go over the current tax rates and the new alternative minimum tax.

12:15 pm – 1:30 pm  
Elder Law & Estate Planning – Oil and Vinegar?
Carlyn McCaffrey, LL.B., LL.M., AEP® (Distinguished)
McCaffrey will focus on best practices for structuring and administering grantor retained annuity trusts. She will discuss the requirements for qualified GRATs.

1:30 pm – 2:30 pm  
Recent Wealth Transfer Developments
Jeffrey D. Fisch
Fisch will continue explaining the current economic climate, legislative changes, and how it affects your practice. He will discuss various estate planning instruments and the impact of the recent tax law changes. He will also go over the current tax rates and the new alternative minimum tax.

2:30 pm – 3:00 pm  
Elder Law & Estate Planning – Oil and Vinegar?
Carlyn McCaffrey, LL.B., LL.M., AEP® (Distinguished)
McCaffrey will focus on best practices for structuring and administering grantor retained annuity trusts. She will discuss the requirements for qualified GRATs.

3:00 pm – 4:10 pm  
The Use of Private Premium Funding in Planning with ILTs and BBFRs
Lawrence Brodsky, (Brodsky, Leibo, etc.)
Brodsky will discuss the use of ILTs and BBFRs in estate planning. He will discuss how to structure ILTs and BBFRs to achieve tax and non-tax objectives and how to take advantage of charitable income tax deductions.

4:10 pm – 5:00 pm  
Conference Social Event (included in registration fee)
Flatirons Casino & The Muniz Marine Corps Air Station Alamoar
There are several program topics to special interest and entertainment.

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San Diego is renowned for its mild climate, 70 miles of pristine beaches and a dazzling array of world-class family attractions. The city offers an expansive variety of things to see and do, appealing to guests of all ages from around the world. San Diego’s arts and culture and culinary arts are booming. Beside Park, the largest urban cultural park in the United States, is home to 15 museums, numerous art galleries, a symphony orchestra, the world-renowned San Diego Symphony, as well as one of the country’s largest performing arts complexes, the Civic Center. The world-famous San Diego Zoo, San Diego County offers 90 golf courses and a variety of exciting sports, gaming casinos, a dynamic downtown district, annual special events, multicultural festivals and celebrations, colorful neighborhoods, a rich military history, and much more.

Recommended conference attire is business casual.

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The conference is headquartered at the Hyatt Regency Mission Bay. A stunning transformation brings the epitome of a California coastal chic to this San Diego hotel, with incredible ocean views, waterfront dining, a contemporary poolside lounge, an eco-friendly spa, and redesigned guest rooms. Guests will delight at a waterfront playground with three new pools, waterfront health club, and a full-service spa.

A block of rooms has been reserved for conference attendees with a special rate of $199/night (single/double) plus applicable taxes. Reservations must be made by March 12, 2011 to guarantee the group rate. To register, visit the “conference pages” of www.naepc.org or call 888-421-1442 and reference group code “NAEPC.”

The special rate of $199 includes complimentary continental breakfast, self-parking, and access to the fitness center.

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A full conference run will be available for an additional fee of $199 to all attendees who complete the required materials on the CD.

Transportation
Airline
A full time travel reimbursement is available on a first-come, first-served basis, and will be accepted until October 31, 2010. No refunds will be granted or on after November 1, 2010.

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The Society of Financial Service Professionals is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. States boards of accountancy have final authority on the acceptance of this course for CPE credit. The Society of Financial Service Professionals is also registered with the IRS as an authorizedclearing. ACPA that devotes at least 35% of their practice to graduate level planning meets the prerequisite level of knowledge to attend the program. After attending, participants will be able to identify and explain how new advanced planning techniques can enhance wealth transfer planning. If a conference attendee provides 800 San Diego families with Thanksgiving dinner groceries each year,couples will improve professionalism and personal service to their clients.

Volunteer Event Information
Just in time for Thanksgiving, NAEPF and The NAEPF Foundation will be teaming up with the jackie Robinson Family Foundation to help the San Diego firefighters prepare for their annual Turkey Project! This event provides 800 San Diego families with Thanksgiving dinner groceries each year. NAEPF volunteers will assist in sorting and packing bags of donated groceries for the recipient families.

The event will take place from approximately 9:00 am - 3:00 pm with hot meals, drinks, and refreshments. Attendees must be registered in advance and your duty is to sort, pack, and deliver the bags to keep thousands of families fed. Local conference participants are also welcome to attend.

The Turkey Project will be the 4th Annual NAEPF/ The NAEPF Foundation to New Orleans in 2007, packing food boxes at St. Mary’s Food Bank in San Francisco in 2008, and providing Thanksgiving meals for the San Diego community for the past 3 years. To volunteer, please visit www.naepf.org to make your reservation or call 800-654-2240 and reference conference code NAEPF.
COMPANION PROGRAM

COMPANION REGISTRANT INFORMATION – Companion conference registration fee includes all breakfasts, the Wednesday evening welcome reception, companion tours, and the Thursday evening social event. Please note, educational sessions are not available to companions.

WEDNESDAY, NOVEMBER 17, 2010
JULIAN, CALIFORNIA – 8:30 am – 4:00 pm
WWW.JULIANCA.COM

Attendees will spend the day at this premier mountain getaway just an hour east of San Diego in the beautiful Guenancia Mountains. Arriving the city in the early morning, guests will have time on their own for shopping, sightseeing, and lunch. At 1:30 pm the group will head over to Smith Ranch for a 1 1/2 hour Julian Trail & Gold Mine tour to experience the historic side of Julian while riding on an 18” gauge mining train. Beautiful scenery abounds on the mile-long round trip over two trestle bridges and a 225 degree curve. Participants will disembark at a real 1870 gold rush mine and be offered time to explore!

The weather in Julian in November is unpredictable and can be cool, please plan accordingly.

Gourds will set off to Julian at approximately 9:30 am and will have time on their own for shopping, sightseeing, and lunch. At 12:30 pm the group will head over to Smith Ranch for a 1 1/2 hour Julian Trail & Gold Mine tour to experience the historic side of Julian while riding on an 18” gauge mining train. Beautiful scenery abounds on the mile-long round trip over two trestle bridges and a 225 degree curve. Participants will disembark at a real 1870 gold rush mine and be offered time to explore!

The weather in Julian in November is unpredictable and can be cool, please plan accordingly.

FRIDAY, NOVEMBER 19, 2010
BALBOA PARK – 9:00 am – 4:00 pm
WWW.BALBOAPARK.ORG

Balboa Park is our nation’s largest urban cultural park. Home to 15 major museums, renowned performing arts venues, beautiful gardens, and the San Diego Zoo, the park has an ever-changing calendar of museum exhibitions, plays, musicals, concerts, and classes - all in the beautiful and timeless setting of this must see San Diego attraction.

Balboa Park is also well known for the lush, landscaping and lovely gardens on its 1,200 acres, offering a magnificent backdrop for the cultural attractions. The park was ranked among the best parks in the world by the Project for Public Spaces in 2003 for its mixture of horticulture and art and culture.

All participants will be provided with a one-day pass that allows guest admission to any four participating attractions. All attendees are encouraged to visit the Balboa Park website in advance to plan their visit.

THURSDAY, NOVEMBER 18, 2010
OLD TOWN SAN DIEGO – 9:30 am - 4:00 pm
WWW.OLDTOWNSAN DieGOGUIDE.COM

Considered the “birthplace” of California, scarcely more than one mile in length and one-half mile in width, Old Town encompasses most of the important aspects of San Diego’s early history. The village of historic Old Town offers plenty to do and see, including shops, restaurants, historical structures and museums, as well as a delightful mix of ambiance, quaint sidewalk shops, live music, and entertainment. Attendees will begin their day with a tour of the Whaley House, rumored to be one of the most haunted buildings in the country. At the conclusion of the tour of Whaley House, participants will be on their own to explore the many offerings of Old Town San Diego.

COUNCIL LEADERSHIP DAY is designed to be a sharing session among leaders of NAEPc affiliated local councils. The morning is dedicated to the National Association of Estate Planners & Councils and The NAEPc Foundation annual business meetings and committee updates, while afternoon sessions are committed to leadership development. The attendee can expect to interact with fellow volunteer leaders, attend breakout sessions designed for idea sharing and growth, and learn about ongoing NAEPc programs and services. Nearly 50% of affiliated local councils are represented by officers, administrators, and/or board members each year. Don’t miss the opportunity to share your council’s successes, learn how to overcome the struggles, and deliver valuable benefits to your members.

It is the NAEPc’s belief that an important part of leadership development and knowledge lies within council staff. As such, administrators (paid council staff) are encouraged to attend the Council Leadership Day activities at no charge.

COUNCIL LEADERSHIP DAY SCHEDULE*

7:30 am - 8:30 am
Breakfast

8:30 am - 12:00 pm
NAEPc & The NAEPc Foundation Annual Meetings
(council leaders should attend this portion of the program)
Informational Updates - Review of Benefits, Programs & Services Available to Councils and Council Members

12:00 noon - 1:00 pm
Lunch

1:00 pm - 5:00 pm
Council Leadership Sharing Sessions
Administrator Development Sessions
General Recap

5:00 pm - 7:00 pm
Welcome reception for all attendees and registered companions

* A detailed final schedule will be distributed to Council Leadership Day Package attendees at the conference.
COMPANION PROGRAM

COMPANION REGISTRANT INFORMATION -- Companion conference registration fee includes all breakfasts, the Wednesday evening welcome reception, companion tours, and the Thursday evening social event. Please note, educational sessions are not available to companions.

WEDNESDAY, NOVEMBER 17, 2010

JULIAN, CALIFORNIA -- 8:30 am - 4:00 pm
WWW.JULIANCA.COM

Attendees will spend the day at this premier mountain getaway just an hour east of San Diego in the beautiful Guaymas Mountains. Entering the city late taking a memory back in time to the days of the 1870’s gold rush. This tour will allow participants to get away from the hectic rush of city life and discover the charms of Julian... all while enjoying the fabulous pie the city is famous for!

Guests will arrive in Julian at approximately 9:30 am and will have time on their own for shopping, sightseeing, and lunch. At 12:30 pm the group will head over to Smith Ranch for a 1 ½ hour Julian Train & Gold Mine tour to experience the historic side of Julian while riding on an 18” gauge mining train. Beautiful scenery abound on the mile-long round trip over two trestle bridges and a 225 degree curve. Participants will disembark at a real 1870 gold rush mine and be offered time to explore!

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THURSDAY, NOVEMBER 18, 2010

OLD TOWN SAN DIEGO -- 9:30 am - 4:00 pm
WWW.OLDTOWNSANDEIGOGUIDE.COM

Considered the “birthplace” of California, scarcely more than one mile in length and one-half mile in width, Old Town encompasses most of the important aspects of San Diego’s early history. The village of historic Old Town offers plenty to do and see, including shops, restaurants, historical structures and museums, as well as a delightful mix of ambience, quaint sidewalk shops, live music, and entertainment. Attendees will begin their day with a tour of the Whaley House, rumored to be one of the most haunted buildings in the country. At the conclusion of the tour of Whaley House, participants will be on their own to explore the many offerings of Old Town San Diego.

FRIDAY, NOVEMBER 19, 2010

BALBOA PARK -- 9:00 am - 4:00 pm
WWW.BALBOAPARK.ORG

Balboa Park is our nation’s largest urban cultural park. Home to 15 major museums, renowned performing arts venues, beautiful gardens, and the San Diego Zoo, the park has an ever-changing calendar of museum exhibitions, plays, musicals, concerts, and dances... all in the beautiful and timeless setting of this must see San Diego attraction.

Balboa Park is also well known for the lush, landscaped and lovely gardens on its 1,200 acres, offering a magnificent backdrop for the cultural attractions. The park was ranked among the best parks in the world by the Project for Public Places in 2003 for its mixture of horticulture and art and culture.

All participants will be provided with a one-day pass that allows guest admission to any four participating attractions on Friday, November 19, 2010 (San Diego Zoo excluded). Attendees are encouraged to visit the Balboa Park website in advance to plan their visit.

COUNCIL LEADERSHIP DAY PROGRAM

WEDNESDAY, NOVEMBER 17, 2010

COUNCIL LEADERSHIP DAY is designed to be a sharing session among leaders of NAEP C affiliated local councils. The morning is dedicated to the National Association of Estate Planners & Councils and The NAEP C Foundation annual business meetings and committee updates, while afternoon sessions are committed to leadership development. The attendee can expect to interact with fellow volunteer leaders, attend breakout sessions designed for idea sharing and growth, and learn about ongoing NAEP C programs and services. Nearly 50% of affiliated local councils are represented by officers, administrators and/or board members each year. Don’t miss the opportunity to share your council’s successes, learn how to overcome the struggles, and deliver valuable benefits to your members.

It is the NAEP C’s belief that an important part of leadership development and knowledge lies with in council staff. As such, administrators (paid council staff) are encouraged to attend the Council Leadership Day activities at no charge.

COUNCIL LEADERSHIP DAY SCHEDULE*

7:30 am - 8:30 am
Breakfast

8:30 am - 12:00 pm
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Informational Updates - Review of Benefits, Programs & Services Available to Councils and Council Members

12:00 noon - 1:00 pm
Lunch

1:00 pm - 5:00 pm
Council Leadership Sharing Sessions
Administrator Development Sessions
General Recap

5:00 pm - 7:00 pm
Welcome reception for all attendees and registered companions

* A detailed final schedule will be distributed to Council Leadership Day Package attendees at the conference.


**GENERAL INFORMATION**

**TRANSPORTATION INFORMATION**

Rental car — NAEPC has arranged for special discounts with Hertz for attendees of the 2010 Conference. To make a reservation, call 1-800-654-2240 and reference CORVUSB0008 to obtain the special group rate.

**SHUTTLE SERVICE**

For the benefit of attendees of the 2010 Conference, NAEPC has arranged for a 42 seat van/4 round trip discount for those who choose to use Super Shuttle. Book online at www.supershuttle.com or by calling 800-BLUE-CAR and referring group code DWSV.

**AIRLINE**

Aerotaxi traveling via airline are encouraged to utilize San Diego International Airport.

**CANCELLATION POLICY**

Any cancellation must be received in writing or via email to conference@naepc.org before September 30, 2010. Registrants who cancel between October 1, 2010 and October 31, 2010 will forfeit a $150 administrative fee. No refunds will be granted or on or after November 1, 2010.

**CONTINUING EDUCATION CREDIT INFORMATION**

14.5 hours of Accredited Estate Planner® designation credit have been awarded for this program.

Continuing education credit is administered by the Society of FSP. The following credit has been requested in all states: insurance, legal, accounting, CPA, CFP, and M&AE for Thursday, November 18, 2010 and Friday, November 19, 2010. Information about the current CE credit hours may be available at www.naepc.org. Individual states determine the total number of credits awarded.

To check your credit award, go to www.financialpros.org/public/cf and click on "NAEP.

**The Society of Financial Service Professionals is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors**.

**Volunteer Event Information**

Just in time for Thanksgiving, NAEPC and The NAEPC Foundation will be teaming up with the Jackie Robinson Family YMCA to help the organization prepare for their annual Turkey Project! This event provides 800 San Diego families with Thanksgiving dinner groceries each year. NAEPC volunteers will assist in sorting and packing boxes of donated groceries for the recipient families.

The event will take place from approximately 9:30am - 3:30pm on Thursday, November 25th. Participants must register in advance and you are encouraged to sign up for the largest group possible. Volunteers must be available to work two full shifts from 9:30am to 3:30pm. Local conference participants are also welcome to attend.

**The Turkey Project will be the 4th Annual NAEPC / The NAEPC Foundation Volunteer Team Building Event. This project has taken great pride in offering our volunteer hours each year in conjunction with the annual conference. Past events have supported the Jackie Robinson Family YMCA in New Orleans in 2007, packing food boxes at St. Mary’s Foodbank in San Francisco in 2008, and helping to provide a clean up of American Beach on Amida Island in 2009.**
This conference is paper-light! Please review General Information tab for details.

### Registration Discounts
- 50% off discounted rate applies to registrants received prior to September 30, 2010 (see below for exceptions.)

### Special Notices
- A member of the AEP® designees participates in the AEP® Conference.
- AEP® designees who participate in the conference receive a 50% discount on the registration fee.
- Non-participating AEP® designees and credit cards will no longer be accepted.
- Special rates apply to AEP® designees.
- Discounted rates apply to members of the financial services industry (see below for details).
- Discounted rates apply to members of the financial services industry (see below for details).

### Registration Information
- Registration for the conference will be available online at www.napfc.org.
- Registration forms must be accompanied by payment or a purchase order.
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The NAEPC Foundation
120 Chester Ave., Suite 470
Cleveland, OH 44114

47th Annual Conference
November 17-19, 2010

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Trusts & Estates

New!

Continuing education credit requested for attorneys, insurance professionals, accountants, CFP®, CTFA and PACE designees. 14.5 hours of Accredited Estate Planner® designation credits are available!

COVENTRY
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