Continuing education credit requested for attorneys, insurance professionals, accountants, CFP®, CTFA and PACE designees. 15.5 hours of Accredited Estate Planner® designation credits are available!
CONFERENCE EDUCATIONAL PACKAGES

- $395 day companion registration includes conference breakfasts, the Wednesday-Friday companion tours, and the Wednesday evening welcome reception.
- $295 companion registration includes conference breaks, the Thursday-Friday companion tours, and the Wednesday evening welcome reception.
- $195 day companion registration includes conference breaks, the Thursday-Friday companion tours, and the Wednesday evening welcome reception.


declaration of Conflicts of Interest

All panelists and presenters were asked to disclose conflicts of interest. Any pre-existing relationships that might affect the presentation were identified and, in some cases, members of the audience were given the opportunity to ask questions about the stated conflicts.


declaration of Financial Relationships

All panelists and presenters were also asked to disclose any financial relationships they have with companies that make products or offer services related to the topics of their presentations. Any relevant financial relationships were identified and, in some cases, members of the audience were given the opportunity to ask questions about these relationships.


declaration of Intellectual Property

All panelists and presenters were also asked to disclose any intellectual property they own or have rights to, including patents, trademarks, copyrights, and trade secrets. Any relevant intellectual property was identified and, in some cases, members of the audience were given the opportunity to ask questions about these properties.


declaration of Financial Interests

All panelists and presenters were also asked to disclose any financial interests they have in the topics of their presentations, including any investments, loans, gifts, or other financial arrangements. Any relevant financial interests were identified and, in some cases, members of the audience were given the opportunity to ask questions about these interests.


declaration of Ethics

All panelists and presenters were also asked to disclose any ethical considerations related to the topics of their presentations. Any relevant ethical considerations were identified and, in some cases, members of the audience were given the opportunity to ask questions about these considerations.
STEVEN J. OSHINS, JD, AEP® (Distinguished)  
Mr. Oshins is a Managing Director and Senior Advisor at Morgan Stanley Wealth Management. He joined Morgan Stanley in 1999, and specializes in comprehensive wealth transfer, tax planning, and special needs planning. He is a member of the Florida Bar  and the stands for clients and currently works with private clients and their own advisors in the areas of estate planning, charitable giving, retirement distribution planning, and estate administration. Mr. Oshins is a frequent speaker at industry conferences throughout North America.  

MARTIN E. GEIST, JD, AEP® (Distinguished)  
Mr. Geist is a Certified Financial Planner at AEG Stockman Wealth Management in Austin, Texas.  He is an author and a featured speaker at conferences and seminars throughout the country on various topics including the interplay between the personal and corporate income tax, estate planning, and personal financial planning. Mr. Geist is a frequent lecturer in the areas of estate and tax planning.  

STEPHEN V. MORRIS, CFP®  
Mr. Morris is a Principal at我們的全國性財富管理公司。 He specializes in estate planning, tax planning, and retirement planning. He has extensive experience in helping clients achieve their financial goals. He is a frequent speaker and guest on various financial programs.  

JEFFREY N. PENNELL, JD  
Mr. Pennell is a partner at the law firm of WilmerHale. He represents clients in all aspects of estate planning, business succession, tax planning, and charitable giving. Mr. Pennell is a frequent speaker and guest on various financial programs.  

ROBERT S. KEESLER, CPA, MST, AEP® (Distinguished)  
Mr. Keesler is a Partner at the accounting firm of Turgeon & Whitman. He specializes in estate planning, business succession, and tax planning. He has extensive experience in helping clients achieve their financial goals. He is a frequent speaker and guest on various financial programs.  

SANDIE W. RUSSELL, JD, MBA, AEP® (Distinguished)  
Ms. Russell is a lawyer and wealth advisor at the law firm of Heckerling Institute on Estate Planning. She is an expert in estate planning, business succession, and tax planning. She has extensive experience in helping clients achieve their financial goals. She is a frequent speaker and guest on various financial programs.  

ROBERT S. KEEBLER, CPA, MST, AEP® (Distinguished)  
Mr. Keesler is a Partner at the accounting firm of Turgeon & Whitman. He specializes in estate planning, business succession, and tax planning. He has extensive experience in helping clients achieve their financial goals. He is a frequent speaker and guest on various financial programs.  

SANDRA K. CASARETT, JD, LLM, AEP® (Distinguished)  
Ms. Casarett is an Associate Professor of Law and co-director of the Elder Law and Special Needs Planning Certificate at the University of Virginia School of Law. She is an expert in estate planning, business succession, and tax planning. She has extensive experience in helping clients achieve their financial goals. She is a frequent speaker and guest on various financial programs.  

JASON B. HOFFMAN, JD, AEP® (Distinguished)  
Mr. Hoffman is a Partner at our national law firm. He specializes in estate planning, business succession, and tax planning. He has extensive experience in helping clients achieve their financial goals. He is a frequent speaker and guest on various financial programs.  

SANDRA B. WISE, JD, AEP® (Distinguished)  
Ms. Wise is a Managing Director at our national investment bank. She specializes in estate planning, business succession, and tax planning. She has extensive experience in helping clients achieve their financial goals. She is a frequent speaker and guest on various financial programs.  

SANDRA L. AKERS, JD, AEP® (Distinguished)  
Ms. Akers is a Senior Counsel at our national law firm. She specializes in estate planning, business succession, and tax planning. She has extensive experience in helping clients achieve their financial goals. She is a frequent speaker and guest on various financial programs.  

STEVEN J. OSHINS, JD, AEP® (Distinguished)  
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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 Education 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 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*

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>7:30 am</td>
<td>Breakfast</td>
</tr>
<tr>
<td>8:30 am</td>
<td>NAEPC &amp; The NAEPC Education Foundation Annual Meetings</td>
</tr>
<tr>
<td></td>
<td>(Council leaders should attend this portion of the program)</td>
</tr>
<tr>
<td>12:00 pm</td>
<td>Lunch</td>
</tr>
<tr>
<td>1:00 pm</td>
<td>Council Leadership Sharing Sessions</td>
</tr>
<tr>
<td>5:00 pm</td>
<td>Welcome reception for all attendees and registered companions</td>
</tr>
</tbody>
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* A detailed final schedule will be distributed to Council Leadership Day Package attendees at the conference.

WEDNESDAY, NOVEMBER 16, 2011

FREDERICKSBURG, TEXAS AND THE HILL COUNTRY – 8:30 AM - 4:00 PM
WWW.FREDERICKSBURG-TEXAS.COM

Our coach will depart the Marriott Rivercenter with a uniformed guide to escort participants to the beautiful Texas Hill Country.

Before entering into Fredericksburg, the coach will make a stop at The Wild Seed Farm, home to any type of floral seed imaginable; an amazing gift shop with items for home and garden, a butterfly exhibit, and acres of wildflowers suitable for exploring.

The next stop is Becker Vineyards. Planted in 1992 on 36 acres of French vinifera grapes, this winery houses the largest underground wine cellar in Texas and is home to award-winning wines known throughout the United States. Attendees will be treated to a private tour of the vineyard and press house, bottling, and cellaring areas.

Then it’s on to the main attraction! Fredericksburg, Texas, a town settled by German immigrants in the early 1800's, is rich with history. There are numerous historical buildings, restaurants and museums along the main streets. The many shops of Fredericksburg are in a four-block area and make it a delightful place to find unique gifts, and items from the Hill Country and Texas. Participants will have time to explore the area and have lunch prior to boarding the coach for the return trip.

THURSDAY, NOVEMBER 17, 2011

SPOTLIGHTING THE MISSIONS – 9:00 AM - 4:00 PM
WWW.VISITSANANTONIO.COM

One of the country’s few National Parks within an urban setting, the San Antonio Missions tell the story of the European expansion in the New World. Get set for a day exploring the history of the missions of San Antonio.

The “Queen of the Missions”, Mission San Jose, is the first stop. Established in 1720, this is the largest and best restored of San Antonio’s five missions. Participants will tour the Indians’ and Spanish soldiers’ quarters, both located within the walls. San Jose’s church is one of the most beautiful in the country with its elaborate carvings on the chapel façade. After seeing Mission San Jose, the group will stop at one of the area’s wonderful Mexican restaurants, Don Pedro’s, where lunch will be on your own.

The next stop - Mission Espada! Established in 1731 and never completed, this mission still stands as an outline of an intended church. Time stands still at Espada, which seems as remotely located today as the day it was built.

The third mission made its permanent home along the banks of the San Antonio River in 1718. Mission San Juan Capistrano established a trade network stretching east to Louisiana and south to Coahuila, Mexico.

The next to last of the missions is the oldest unrestored mission church in Texas. Mission Concepcion was an intended church. Time stands still at Espada, which seems as remotely located today as the day it was built.

The final stop on this tour is the most famous mission of them all - the Alamo. Guests will tour the chapel plus years.

Friday, November 18, 2011

Gruene, Texas...GET YOUR DANCING SHOES ON! – 9:00 AM - 4:00 PM
WWW.GRUENETEXAS.COM

Take in a day of art and culture in the historic city of Gruene, whether at its monthly Gruene Market Days, a juried art show incorporating mediums from painting to sculpture, or by browsing the displays of up to 100 artisans and craftsmen. Downtown Gruene comes alive with music and authentic German cuisine, on ode to the heritage of this European-influenced city.

Attendees won’t want to miss Gruene Hall. Built in 1878, the facility is Texas’ oldest continually operating and most famous dance hall. By design, not much has physically changed since first built. The 6,000 square foot dance hall with a high pitched tin roof still has the original layout with side flaps for open air dancing, a bar in the front, a small lighted stage in the back, and a huge outdoor garden. Advertisement signs from the 1930’s and 40’s still hang in the old hall and around the stage.

Welcome reception for all attendees and registered companions
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 Education 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.

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COUNCIL LEADERSHIP DAY SCHEDULE*

7:30 am - 8:30 am
Breakfast

8:30 am - 12:00 pm
NAEPC & The NAEPC Education 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 pm - 1:00 pm
Lunch

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

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.
The conference will be held at the Marriott Rivercenter. The magnificent 30-story hotel is conveniently located on the San Antonio River Walk and offers many great activities, including shopping at the Rivercenter Mall and the cultural and historical landmarks of San Antonio.

A block of rooms has been reserved for conference attendees at a special rate of $129 per night. The block will be available from Sunday, November 13, 2011, to Thursday, November 17, 2011. Conference attendees may make reservations online, by phone, or by fax.

** Lodging Information **

### Registration Information

**= San Antonio, TX – General Information**

**Presentation Materials & Roster of Attendees**

All Council Leadership Day and Educational registrants will receive the technical materials in two formats. 

- A CD that contains a full outline for each presentation (advance access)
- Also will be available online and downloaded to all registered attendees during conference registration

**An abbreviated outline in the conference registration binder**

A CD version of the program will be available for purchase.

**All registrants are encouraged to bring a laptop computer to the conference to access the materials on the CD.**
Companion Registrant Fee  $__________

Please check all that apply:

- I will attend the tour on Thursday, November 17, 2011
- I will attend the welcome reception on Wednesday, November 16, 2011
- I will attend the tour on Friday, November 18, 2011
- I will attend the welcome reception on Wednesday, November 16, 2011
- I will attend the volunteer event on Saturday, November 19, 2011
- I am an active AEP® designee and will attend the designation marketing session
- I will attend the volunteer event on Saturday, November 19, 2011
- I am a Registrant
- I will attend the volunteer event on Saturday, November 19, 2011
- I have made a check payable and mail to:

- MasterCard
- Visa

Make check payable and mail to:

The NAEPC Education Foundation
1163 Chestor Ave., Suite 470
Cleveland, OH 44114

On or register online at www.naepc.org

Or register with credit card information to: 216-696-2582

VISA
MasterCard
American Express

ACCOUNT NUMBER

EXP. DATE

SIGNATURE

10:35 am - 11:45 am: 
New Planning Paradigms Under the Tax Relief Act of 2010

STEVE R. FITHIAN, J.D., AEP® (Distinquished)

This presentation will explain the planning opportunities on estate taxes, planning for charitable gifts, including the recent elimination of the unified gift and estate tax exemption, and the simplification of estate tax return filing. It will review the estate tax plan requirements and explore planning strategies to maximize flexibility and to take advantage of opportunities afforded by the Act.

12:15 pm - 1:30 pm: 
Lunch

1:30 pm - 2:30 pm: 
Last Acts

DAVID CASARETT, M.D., M.A.

What would you do if you had an hour, a day, or a week to live? How would you use your time? And what are some ways of using that time better, more useful, more meaningful, more important, more meaningful than others? Dr. Casarett explores those and many other ways in which people choose to use their time when that is limited. Leaving a legacy, strengthening relationships with family, balancing careers and family, facing death, dealing with family and estate planning — all are just a few of the “last acts” that many people and patients choose to do.

2:30 pm - 3:20 pm: 
Flexible Trusts and Planning the Ineligible

SIDNEY ROTHCHILD, J.D., CPA, AEP® (Distinquished)

This presentation will examine some of the methods to give the trustee flexibility while protecting the beneficiaries of an estate that is not charitable. The attorney will discuss with the listener ways the planner wishes to incorporate some of these tools in an existing irrevocable trust (or has a trust which was formed in the past) in order to provide some insurance for later changes that may occur in the trust or beneficiaries.

3:55 pm - 5:00 pm: 
Some of the Best Estate Planning Ideas We Haven’t Seen Out There (That Also Have the Merit of Planning Ideas with Certain “Clicked at the Window”)

5. STACY FASTLAND, J.D., AEP® (Distinquished)

This presentation will address some ideas that the attorney may want to utilize in the context of family limited partnerships and charitable remainder trusts, the leveraged buy-out charitable lead annuity trust, the leveraged renewable energy charitable lead trust, and the best ideas for allowing a client in a family limited partnership to

5:10 pm - 6:00 pm: 
Networking at The Companionship Café

SUNDAY, NOVEMBER 19, 2011

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Cleveland, OH 44114

On or register online at www.naepc.org

Or register with credit card information to: 216-696-2582

VISA
MasterCard
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3-day Conference Registration Package  $400

This package includes conference exhibitors, the Thursday-Friday companion tours, and the Wednesday evening welcome reception.

2-day Conference Registration Package  $350

This package includes conference exhibits, the Thursday-Friday companion tours, and the Wednesday evening welcome reception.

$50 early bird discount applies to registrations received prior to September 30, 2011

• This presentation is a must for planners who use insurance for closely held businesses
• Business insurance policies are subject to various boundaries, benefits and limitations

In this presentation, Fithian will share his concept of the Why vs. How of planning.

You didn’t explain it right…or maybe it wasn’t the right situation…or maybe the client didn’t understand what you intended. This presentation will address some of the reasons why this is probably more related to how you spend your time with your prospects and clients. Aligning the Why and the How is critical to being a more successful professional planner.

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New!

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Immediate Past President
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Lakewood, CO

48TH ANNUAL CONFERENCE

The NAEPC Education Foundation
& National Association of Estate Planners & Councils

Fidelity Charitable Services
Northwestern Mutual
Trusts & Estates

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NOVEMBER 16-NOVEMBER 18
2011
San Antonio, TX