Continuing education credit will be requested nationwide for attorneys, insurance professionals, accountants, and CFP®s, CTFA and PACE designees. Up to 15 hours of credit may be available! 16.5 hours of Accredited Estate Planner® designation credit is available!

*See general information page for details. Insurance professionals must attend the entire conference as partial credit is not available.


**EDUCATIONAL PROGRAM**

**FRIDAY, NOVEMBER 9, 2012**

**6:30 - 8:00 am**

**Breakfast**

**7:00 - 7:50 am**

**Sponsor Bonus Session**

The Best in Life Insurance — The Most Generous Offering

**8:00 - 9:00 am**

**NAEPC Annual Awards Ceremony**

**9:00 - 10:00 am**

**The Mathematical Constants of Estate Taxes**


**REGISTRATION DISCOUNTS**

- **$250 Executive/Center EPC Discount** (available to attendees of national conferences)
- **$250 early bird discount available to attendees of national conferences**
- **$100 NAEPC volunteer discount (available to non-paid volunteers of any committee of NAEPC)**

**CONFERENCE EDUCATIONAL SESSION INFORMATION**

- **1.5 CE hours per day**
- **All sessions recorded for one year**
- **All sessions will be available on the NAEPC website**

**CONFERENCE REGISTRATION**

- **$710 Single/Double Room**
- **$850 Single/Double Room**

**CONFERENCE ACCOMMODATIONS**

- **1130 Cherry Ave., Suite 470**
- **414-924-6300**

**MAKE CHECK PAYABLE TO:**

The NAEPC Education Foundation

**NEW THIS YEAR!**

**EDUCATIONAL BONUS SESSIONS**

will be offered 7:00 am on Thursday, November 8th and Friday, November 9th.

Attendance offers additional complimentary educational content and may provide continuing education credit. See the “technical education session information” tab for additional details.

*The sponsoring company may provide CE credits for attendees.*
GRANT's and installment sales can be the most effective tax leveraging techniques for high net worth clients. As a city known for state-of-the-art entertainment, Orlando means the traditional with the avant-garde. The Orlando Ballet and FAIRWINDS Broadway Across America — Orlando series are the historic cornerstone of the performing arts community and a similar mix can be found within the visual arts — the Orlando Museum of Art, CityArtsFactory, and the Charles Hosmer Morse Museum of American Art convey the destination's wide range of sensibilities.

The 49th Annual Conference was specially timed to be near two fantastic Walt Disney World® events:

Festival of the Masters presented by Michael's® is a vibrant, open-air art festival held each fall in the Downtown Disney area, scheduled from November 9 – 11, 2012. Featuring award-winning artists and entertaining experiences, this world-renowned show has a highly anticipated annual event for guests, artists, and collectors. This lively festival offers something for the whole family, including:

• Dazzling displays of one-of-a-kind and limited-edition painting, photography, sculpture, jewelry, and more
• Hands-on activities for guests of all ages and interests
• Live musical performances
• Unique shopping opportunities from first to Disney collectibles

A food and wine level’s paradise awaits you at EpicPlex Theme Park with the EpicPlex Food & Wine Festival, held September 26 – November 11, 2012. It’s something to satisfy every taste and taste. In addition to some of the best food to be found in the Orlando area, this annual autumn event features a delightful array of offerings, including:

• International kiosks featuring tasty taps and refreshing beverages
• Flop city street cuisine
• Mosaic classes and wine tastings
• Live musical performances by popular his & scenes

Attending the 49th Annual Conference allows for special Walt Disney World® events. Visit the “conferences” page of www.naepc.org for more information.

The conference is headquartered at the Buena Vista Palace Hotel & Spa. Experience Orlando resort magic with the luxury of Downtown Disney, the hotel that attracts the world’s best. Among 27 show-stoppers above the law for VIP limitations, the special conference package includes $50 in dining and entertainment credits for restaurants and bars on Disney property. Experience the verve of disney for exceptional quality and service in spirits, cocktails. The property is located in the heart of Downtown Disney® featuring the Marketplace and Downtown Disney’s West Side.

The Federal Defense of Marriage Act defines marriage at the federal level as a legal union between one man and one woman and specifies that state recognition of marriages entered into in other jurisdictions is only required to the extent that such recognition is otherwise consistent with the Federal Defense of Marriage Act.

Entry Options for Clients with CITs

Affinity to Downtown Disney Management, LLC

This presentation will explore the process of tax planning for high net worth clients. The discussion will include practical issues involved in using GRAT's and installment sales. We will also consider how GRAT’s and installment sales may be used (or not used) in a particular situation. It will offer thoughts on how some situations may be approached differently.

If you would like to print a PDF of this material, the following credit will be requested in all states: insurance, legal, accounting, and/or other credit not provided in your state. Because of the opportunity to earn multiple credits when attending this program, you may choose how you wish to allocate your credits and/or presentations.

Theater C

11:35 - 11:50

Lunch

11:35 - 11:50

IHA Distribution Planning

THOMAS C. FOSTER, JD

Foster will present a case study of a unique technique for distribution planning that combines traditional and Roth IRA’s. The discussion will also include an overview of the IRA distribution rules and why the classic traditional IRA distribution strategy may not work for everyone.

11:50 - 12:00

Break

12:00 - 1:00

GATR Venue Installation Sales Comparison (JULY 2012)

DKM

GATR’s installment sales tax tables are one of the most well-received tax forms by financial professionals. This presentation will compare the delivery of tax tables for installation sales with traditional sales and the advantage that GATR’s tax tables may have over traditional sales.

2:00 - 2:30

Presentation Material & Steward of 49th Annual Conference

BRUCE R. MOORE

The 49th Annual Conference is comprised of many different professionals, governed by different states of their tastes. This program will discuss how these professionals work together to coordinate the various sessions and how they plan to deliver the best educational experience possible for all attendees.

2:30 - 3:00

At the Single Family Home

CHARLES H. KELLER, JR., CFP®, AEP®

As a city known for state-of-the-art entertainment, Orlando means the traditional with the avant-garde. The Orlando Ballet and FAIRWINDS Broadway Across America — Orlando series are the historic cornerstone of the performing arts community and a similar mix can be found within the visual arts — the Orlando Museum of Art, CityArtsFactory, and the Charles Hosmer Morse Museum of American Art convey the destination’s wide range of sensibilities.

3:00 - 3:30

At the Single Family Home

TOMAS C. FOSTER, JD

Foster will present basic information and techniques for distribution planning from both a traditional and Roth IRA’s perspective. The session will also provide a case study of a unique technique for distribution planning that combines traditional and Roth IRA’s. The discussion will also include an overview of the IRA distribution rules and why the classic traditional IRA distribution strategy may not work for everyone.

3:30 - 4:00

Break

4:00 - 4:30

Private Session for Active Accredited Estate Planner® Designation holders

New AEP® Designations Can Work Effectively as Collaborative Teams and Add Value to the Relationship

ROBERT S. KESSLER, CPA, AEP®, (Designation)

The income tax is the leading estate tax. This is the main reason in the area to have a daily call to provide a wide range of information and to continue to improve the education of the profession.

4:30 - 5:00

PRIVATE SESSION FOR ACTIVE ACCREDITED ESTATE PLANNER® DESIGNATION HOLDERS

New AEP® Designations Can Work Effectively as Collaborative Teams and Add Value to the Relationship

ROBERT S. KESSLER, CPA, AEP®, (Designation)

The income tax is the leading estate tax. This is the main reason in the area to have a daily call to provide a wide range of information and to continue to improve the education of the profession.

5:00 - 5:30

NEW THIS YEAR: Educational Bonus Sessions

The average daily high temperature in the area in November is 80 degrees and the average daily low temperature is 60 degrees. The weather is very nice and comfortable and the average rainfall for the entire month is about 0.2 inches.

5:30 - 6:00

Break

6:00 - 6:30

Breakfast

6:30 - 7:00

Sponsor Bonus Sessions

The average daily high temperature in the area in November is 80 degrees and the average daily low temperature is 60 degrees. The weather is very nice and comfortable and the average rainfall for the entire month is about 0.2 inches.
WEDNESDAY, NOVEMBER 7, 2012

AFTERNOON TEA & THREE HOT LAPS AT THE RICHARD PETTY DRIVING EXPERIENCE – 12:30 PM – 3:30 PM

The Richard Petty Driving Experience at Walt Disney World® Speedway is where grown-up dreams come true. Participants on this tour will get to experience the thrill of three laps around the race track riding shotgun in a 2-seat NASCAR race car driven by a professional instructor! When not on the track, attendees will have an opportunity to cheer on the other participants from pit road. This one-of-a-kind experience will conclude with an afternoon tea service, a first for the speedway!

Participants must be 18 years of age or older.

FRIDAY, NOVEMBER 9, 2012

DISNEY’S KEYS TO THE KINGDOM TOUR – 8:30 AM – 3:30 PM*

Disney’s Keys to the Kingdom Tour highlights the fascinating history of Walt Disney World® Resort and provides backstage access to secret areas of Magic Kingdom theme park.

Guests will hear the intriguing story of Walt Disney and learn how his innovative ideas, revolutionary visions, creative philosophies, and amazing accomplishments brought the theme park to life. The journey includes stops at backstage facilities and a variety of favorite attractions. One unforgettable highlight is a trip below Magic Kingdom into the service tunnels known as the Utilidors. This is one urban legend that is absolutely, and almost unbelievably, true - the guest-accessible areas of Magic Kingdom theme park are actually on the second floor of a massive structure… learn more on this fascinating tour!

Please note, this is a walking tour and the majority of the time will be spent outdoors. Please plan and dress accordingly. Photos are not permitted in any back stage locations and cameras must be kept out of sight during the tour. All entertainment, tour routes, and potential attraction experiences are based upon availability and accordingly. Photos are not permitted in any back stage locations and cameras must be kept out of sight during the tour.

Participants must have an opportunity to purchase lunch at a brief stop mid-tour.

* Attendees have the opportunity to stay in the park and return to the hotel at their leisure. (Please note, transportation for those that choose to stay will not be offered.)

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 conquer the struggles, and deliver valuable benefits to your members.

The National Association of Estate Planners & Councils and The NAEPC Education Foundation Annual Meetings take place the morning of Wednesday, November 7, 2012 and are an excellent opportunity to learn about all of the exciting things happening at the national level to benefit the affiliated local council and its membership. ALL ATTENDEES for Council Leadership Day should attend as these sessions are a part of the program for local council leaders.

COUNCIL LEADERSHIP DAY PROGRAM

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COUNCIL LEADERSHIP DAY SCHEDULE*

7:30 am - 8:30 am
Breakfast

8:30 am - 12:00 pm
NAEP & The NAEPC Education Foundation Annual Meetings
(Council leaders should plan to 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/Paid Staff Development Session

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.
FINAL Moments before man landed on the moon.

The quest for the moon. Guests relive the historic launch of Apollo 8 at the firing room theatre, then marvel at a monstrous 363-foot Saturn V moon rocket, the most powerful rocket ever built, and one of only three Saturn V rockets in existence. Finally, the lunar landing theatre provides a rare look at the harrowing conclusion of the guided tour, guests will be dropped off at the Apollo/Saturn V Center, where they may tour at their own leisure and purchase lunch. The Apollo/Saturn V Center is where dramatic multi-media shows and numerous displays provide guests with an inspirational and exhilarating look into America’s space program from launch preparation to liftoff. Guests are treated to closer views of the Space Shuttle launch Pads and the NASA Causeway. The Shuttle landing facility and the massive Crawler-transporter, which transports the Shuttle from the Vehicle Assembly Building to its launch pad, are also featured. At the conclusion of the guided tour, guests will be dropped off at the Apollo/Saturn V Center, where they may tour at their own leisure and purchase lunch. The Apollo/Saturn V Center is where dramatic multi-media shows and numerous displays provide guests with an inspirational and exhilarating look into America’s quest for the moon. Guests relive the historic launch of Apollo 8 at the Firing Room Theatre, then marvel at a monstrous 363-foot Saturn V moon rocket, the most powerful rocket ever built, and one of only three Saturn V rockets in existence. Finally, the Lunar Landing Theatre provides a rare look at the harrowing final moments before man landed on the moon.

Participants must be 16 years of age or older.

**WEDNESDAY, NOVEMBER 7, 2012**

**AFTERNOON TEA & THREE HOT LAPS AT THE RICHARD PETTY DRIVING EXPERIENCE – 12:30 PM – 3:30 PM**

The Richard Petty Driving Experience at Walt Disney World® Speedway is where grown-up dreams come true. Participants on this tour will get to experience the thrill of three laps around the race track riding shotgun in a 2-seat NASCAR race car driven by a professional instructor! When not on the track, attendees will have an opportunity to cheer on the other participants from pit road. This one-of-a-kind experience will conclude with an afternoon tea service, a first for the speedway!

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**COUNCIL LEADERSHIP DAY SCHEDULE**

- **7:30 am - 8:30 am**
  - Breakfast

- **8:30 am - 12:00 pm**
  - **NAEP & The NAEPC Education Foundation Annual Meetings**
    - (Council leaders should plan to 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/Paid Staff Development Session

- **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.*
GRAT’s and installment sales can be the most effective tax leveraging techniques for 8:00 am
DESIGNEES ONLY

Exit Options for Clients with CRTs
Ten Minutes to Doomsday: wealth Planning in an Uncertain world

Income and Estate Tax Planning for Art and Collectibles
benefit, the advisor must understand the economics and tax consequences of the other collectibles. The discussion will include practical issues and considerations stemming from the fact that they do not receive the same legal protections, benefits, and recognition that their opposite sex counterparts enjoy.

The Estate Planning Team: Do we Play By the Same Rules?

Mr. Blattmachr graduated from Columbia University School of Law cum laude, where he was recognized as a Harlan Fiske Stone Scholar, and received an LL.M. from the University of Michigan Law School. He has served on the board of directors of the Philadelphia Estate Planning Council and is an adjunct professor of law at New York University Law School.

Robert S. Keebler is a partner with Keebler & Associates, LLP. He has been named by the ABA Practical Guide to Estate Planning

the average daily high temperature is 74 degrees and the average daily low temperature is 60 degrees.

Walt Disney World® events:
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EDUCATIONAL PROGRAM
FRIDAY, NOVEMBER 9, 2012

8:30 - 9:00 am
Breakfast

9:00 - 10:30 am
Sponsor Breakfast Sessions
Peter L. Ginn, NA
This course covers recent developments in the market and introduces advanced planning concepts made possible by the market's expansion. Topics to be covered include critical new tools for the secondary market, what impacts do today's high advisors are now using the secondary market as a planning tool. The presentation will specifically discuss the most popular strategies and options for using life insurance as a tool for tax, estate, and insurance. Students will be encouraged to identify strategies for managing their life insurance needs. Finally, several case examples will illustrate the new concepts being presented.

10:30 - 11:00 am
Break

11:00 - 12:00 pm
Mediation in Estate Matters
Ray D. Maddox, JD, LL.M.
As mediation has grown in popularity, there are increased pressures for estate lawyers to encourage parties to resolve their cases through mediation. This program will discuss the nature of mediator's role during mediation and the techniques that may be used to achieve the best results for clients in a mediation.

12:00 - 1:00 pm
Lunch

1:00 - 2:00 pm
The Impossible Dream or A Match Made in Heaven? UPIA Compliance, Risk and Blended Families
Lauren G. Fultsion, MBA, CLU, CFP®
This program is designed to bring awareness to the issues of family planning when dealing with blended families, with a focus on pre- and post-nuptial agreements, marital trusts, and trusts for stepchildren and other non-blood related children. The program will use informal role playing to achieve the best results for blended families.

2:00 - 3:00 pm
Panel Discussions

2:30 - 3:30 pm
Controlling Complex Estates
Jonathan B. Ticknor, JD, LL.M.
This panel will provide an overview of the complex issues that arise in the administration of complex estates. The panel will discuss the role of the estate planning attorney in guiding fiduciaries and beneficiaries in the administration of the estate.

3:30 - 4:30 pm
Panel Discussions

4:30 - 5:30 pm
Planning for Blended Families: A Practical Perspective
Elizabeth A. D'Eon, JD, CFP®
This program will focus on the legal planning for second, third, subsequent marriages, and blended families, with a focus on pre- and post-nuptial agreements, marital trusts, and trusts for stepchildren and other non-blood related children. The program will use informal role playing to achieve the best results for blended families.

5:30 - 6:30 pm
More Educational Bonus Sessions

7:00 - 7:30 pm
Sponsor Bonus Sessions
Peter L. Ginn, NA
This course covers recent developments in the market and introduces advanced planning concepts made possible by the market's expansion. Topics to be covered include critical new tools for the secondary market, what impacts do today's high advisors are now using the secondary market as a planning tool. The presentation will specifically discuss the most popular strategies and options for using life insurance as a tool for tax, estate, and insurance. Students will be encouraged to identify strategies for managing their life insurance needs. Finally, several case examples will illustrate the new concepts being presented.

6:30 - 8:00 pm
NAEPC Annual Awards Ceremony

8:00 - 9:00 pm
The Mathematics of Estate Planning
Robert S. Kiebler, CPA, MFE, M Ed, AEP® (Distinguished)
Most practitioners understand the basic advantages of tax techniques such as GRATs, SEPs, and annual limits. What many actually find difficult are the quantitative analyses that are able to translate these into effective tax planning. The presenters will speak to planning from a practical perspective and will use everyday transactions as an example to illustrate the effective use of these techniques.
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Spokane, WA

NAEPC DIRECTOR EMERITUS, 2012

Hartman Axley, CLU®, CHFC®, JD, CFP®,
MSFS, RHU, AEP®
Lakewood, CO

Continuing education credit will be requested nationwide for attorneys, insurance professionals, accountants, and CFP®, CTFA and PACE designees. Up to 15 hours of credit may be available!*

16.5 hours of Accredited Estate Planner® designation credit is available!

*See general information page for details. Insurance professionals must attend the entire conference as partial credit is not available.