The NAEPC *Foundation*

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

IS YOUR COUNCIL LOOKING FOR A TOP-NOTCH SPEAKER?

WE HAVE THE ANSWER FOR YOU!

The individuals noted below have agreed to speak (within noted guidelines)…
WITH THEIR HONORARIUM WAIVED!

This benefit is only available to councils that are currently affiliated with the NAEPC (2010 council dues must be paid to take advantage of the program).

Who is available to speak?

Robert G. Alexander, JD, LL.M., AEP®, EPLS

TOPICS: 2010 Actually Has Arrived – So Now What Do We Do?; Hot Topics and Current Developments in Estate Planning and Taxation; The Beneficiary Defective Inheritor's Trust – Finessing the "Pipe Dream"; Digging For Dollars – Creative Planning Techniques to Fund Life Insurance Premiums; Estate Planning with Disregarded Entities; Super-charging Marital Deduction Planning – Advanced Planning Considerations; Beneficiary Controlled Trusts- Who Can be Trustees and Beneficiaries; Charitable Planning with IRD Assets; Designing More Flexible Life Insurance Trusts; Enhancing the Planning Value of GRATs, SCINs and IDITs; Estate and Tax Planning with Intentionally Defective Trusts; Generation-skipping Transfer Tax – The Law and Planning Opportunities; Integrating Wealth Transfer Strategies – Planning for Mid-tier Clients; Lifetime Testamentary and Charitable Planning; Making Sense of the Grantor Trust Rules – IRC Sections 671-679; Estate Planning for Distributions from Qualified Plans and IRAs; Asset Protection Planning with Domestic and Foreign Trusts; Tax and Estate Planning with Dynasty Trusts; The Conduit Retirement Plan Trust for Children and Single Beneficiary Trusts; Transferring Closely-Held Business Interests; Special Needs Trusts – What Estate Planners Need to Know; Fiduciary Liability & Responsibility – How to Stay Out of Trouble; Botched Trusts– Tax Disasters & Other Conundrums; What Every Practitioner Needs to Know About International Estate Planning; Tax Planning with Partnership and LLC Interests Held in Trust; Advanced Tax and Asset Protection Planning with Tax Qualified Assets; Super-Charging Estate and Asset Protection Planning with Grantor Trusts; Multi-Jurisdictional Estate Planning; Estate Planning for Non-Traditional Families; Estate and Tax Planning when the Marriage or Domestic Relationship Dissolves; Ten Best Advanced Wealth Planning Strategies; Selecting the Best Asset Protection Entities; Hot Topics and Current Developments with Life Insurance in Wealth Planning.

AVAILABILITY: Monthly / Programs up to 8 hours in length

Attorney Robert G. Alexander is the president and majority shareholder of Alexander & Klemmer, S.C., located in Milwaukee, Wisconsin. He entered private practice in 1978 and concentrates his practice in the areas of domestic and international wealth transfer, asset protection and family business planning, including federal estate and gift taxation, trust and estate administration, fiduciary income taxation, life insurance planning, retirement planning, charitable planning, business organization and succession planning and international tax planning. Attorney Alexander is a graduate of the University of Wisconsin - Madison (B.A. English, 1971), the University of Wisconsin - Madison Law School (JD, 1976), and DePaul University (LL.M. Taxation, 1984). He is admitted to practice before all courts in the State of Wisconsin, the U.S. Federal Courts for the Eastern and Western Districts of Wisconsin, the Seventh Circuit Court of Appeals and the U.S. Tax Court. He is a member of the American Bar Association sections on Real Property, Probate and Trust Law and Taxation; the State Bar of Wisconsin; the Milwaukee and Waukesha Estate Planning Councils; and the Society of Financial Service Professionals. He has earned professional designations as an Estate Planning Law Specialist (EPLS) and Accredited Estate Planner® (AEP®). Attorney Alexander currently holds the office of secretary for the National Association of Estate Planner & Councils and serves as treasurer of the

Estate Law Specialist Board, Inc. He is the chairperson of The NAEPC Foundation Committee of the NAEPC and serves on the NAEPC committee administering the Accredited Estate Planner® designation. He is an NAEPC delegate (past chairperson) to the Synergy Summit, a leading national estate, tax and financial think tank. He served for two years as the original publishing editor of the NAEPC's academic journal, *The NAEPC Journal of Estate and Tax Planning*, and for three years on the board of directors of the Milwaukee Estate Planning Council. Attorney Alexander is a nationally known author and speaker who lectures and teaches extensively for both public and private organizations including the NAEPC, continuing legal education providers, the Wisconsin Institute of CPA's, major insurance companies, brokerage firms, banks, trust companies, community foundations, charitable organizations and various local colleges.

Robert E. Burton, CLU®, ChFC®, AEP®, LL.B.

TOPIC: Crummey Trust Issues and Opportunities; The A-B-C-Ds of Estate Planning; Long-Term Care Insurance, an Essential Estate Conservation Tool; What Every Estate Planning Professional Should Know About Modern Life Insurance Policies; Estate Planning with Life Insurance; Effective Uses of Intentionally Defective Grantor Trusts; ILITs: "Crummey" and "Defective" Means…*Fantastic*

AVAILABILITY: Monthly / Programs up to 2 hours in length

Robert E. Burton, LL.B., CLU®, ChFC®, AEP®, a graduate of Yale University and Columbia Law School, has had a long and distinguished career in the life insurance industry. For 20+ years, he was New York Life's West Coast Senior Advanced Planning Consultant and then spent four years as VP of Management Compensation Group-SF, specializing in non-qualified benefit plans for large corporations. He then became a NYL agent and later affiliated with The Silver Group, which joined Provada Insurance Services in 2006 where he is Director of Advanced Planning. A prolific speaker, he has lectured before numerous estate planning councils and other industry groups, at several estate planning symposiums, including the Practising Law Institute's 37th Annual Estate Planning Institute in San Francisco, twice at MDRT and twice at the Association for Advanced Life Underwriting, to both CPA and FPA organizations, and at several CLU Institutes and Symposiums. A member of three estate planning councils, he is a former president of the San Francisco EPC and is a board member of the National Association of Estate Planners & Councils, which awarded him the Accredited Estate Planner® designation. He is also very active in community affairs and is a former two-term Mayor of Mill Valley, a suburb of San Francisco.

Joseph V. Falanga, CPA, AEP®

TOPIC: Leveraging Wealth Transfer: from the Simple to Sublime; GRATs & Sales to Trusts; Principal & Income; Income in Respect of a Decedent; The World Without Federal Estate Tax and Carry-over Basis

AVAILABILITY: Up to 4 times per year / Programs up to 2 hours in length

Joseph V. Falanga, CPA, AEP® is Senior Managing Director of the Private Client Tax & Advisory Services Group of The Schonbraun McCann Group, LLP an F T I Company. Prior to Schonbraun, Joe was a Managing Director who headed the trust & estate group for RSM McGladrey's New York office. He is a frequent lecturer and has authored numerous articles in professional journals. Currently, Joe is vice president of the National Association of Estate Planners & Councils and he formerly chaired the New York State Society of Certified Public Accountants Estate Planning and Fiduciary Income Tax Committees. Joe is a former president of the New York City Estate Planning Council and has chaired many annual estate planning conferences. He is currently a member of the Estate Planning Committee of NYSSCPA's and served on Pace University's Lubin Business School Alumni Board. Has a BBA from Pace University and an MBA from Fordham University.

Michael W. Halloran, CLU®, ChFC®, AEP®, CFP®, REBC, RHU, LUTCF, MSFS, MSM

TOPICS: The Beneficiary Defective Inheritor's Trust – Finessing the "Pipe Dream"; GRATS; Charitable Remainder Trusts; Charitable Lead Trusts; Due Diligence in Choosing a Life Insurance Policy; Financed Life Insurance and Exit Strategies in the Large Estate Case

AVAILABILITY: Monthly / Programs up to 4 hours in length

Mike is a financial representative with Northwestern Mutual Financial Network and part time professor at the University of North Florida. He has been appeared in several publications including *National Underwriter*, *Money*, *Life Association News*, *Life Insurance Selling New York Times*, *USA Today*, *Chicago Tribune*, *Congressional Quarterly* and *Dow Jones News Wire*. Mike is the current president of the National Association of Estate Planners & Councils, a past national director of the Society of Financial Service Professionals, past director of the Florida Association of Insurance and Financial Advisors, past president of the Jacksonville Association of Insurance and Financial Advisors, Northeast Florida Estate Planning Council, Jacksonville Chapter of the Society of Financial Service Professionals, and the Jacksonville and Buffalo Chapters of the General Agents and Managers Association. Mike attended Florida State University.

Clark B. McCleary, CLU®, ChFC®, MSFS, AEP®

TOPIC: What I Would Want to Know About the Life Insurance Business if I Didn't Already Know It (Or at Least Thought I Did!)

AVAILABILITY: Up to 4 times per year / Programs up to 2 hours in length

Clark has been the recipient of a number of industry awards during his 40 years as a life insurance agent. He has spoken in more than half the states on life insurance issues and practice enhancement strategies. Clark was national president of the Society of Financial Service Professionals in 1999-2000 and was the first recipient to receive that organization's newly created Kenneth Black Leadership Award in 2006. He is a member of two NAEPC chapters in Houston and is a past-president of the Houston Business and Estate Planning Council. NAEPC honored Clark in 2006 by naming him a Distinguished Accredited Estate Planner®.

A special note about Clark's presentation… A few years ago Clark was asked to speak at his affiliated local estate planning council, the Houston Business and Estate Planning Council, for the fourth time during his 25 years of membership. He was uncertain what subject matter he should cover that the audience would find fresh and interesting, so he decided to let the membership determine his content. Clark emailed 15 members, five in each of the attorney, CPA and trust officer categories, and asked what issues that would like to hear him address. The response level was extremely high and well defined, which allowed Clark to construct a presentation that was very well received. He has continued to make that presentation, slightly modified over the years to keep up with the times, because the non-insurance and financial planning members request it.

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How does the program work?

- One presentation per council is available (September 2010 – August 2011) based on speaker guidelines
- Council can note a preferred date / month for the presentation on the application, but must ultimately accommodate the schedule of the speaker. **Specific presentation dates cannot be guaranteed at the time of application.**
- Council is responsible for speaker's travel and lodging expenses. Those that wish to make a donation in the speaker's name are encouraged to do so to The NAEPC Foundation.
- All expenses to produce the meeting (print, postage, food, audio-visual, continuing education, etc.) are the sole responsibility of the Council. **Speaker will not be responsible for printing or shipping costs to prepare outlines, presentations, etc.**
- Council must allow speaker minimal time to offer a brief description of the programs and services available to members of the NAEPC
- Council is welcome to invite speakers who are currently on the NAEPC Board to attend a Board meeting
- Once awarded, Council agrees to notify the NAEPC immediately if plans change and the program will not be offered
- Once awarded, it is the responsibility of the Council to handle all arrangements with the speaker / speaker's representative
- All presentations will be awarded on a first come, first served basis.

After submitting page 5 of this packet via fax to (216) 696-2582 or e-mail to eleanor@naepc.org, a representative from the NAEPC will e-mail the council contact with availability for the speaker. If the speaker is available, we will supply the council contact with address and telephone information for the chosen presenter. The council must then reach out to the speaker to confirm date and time arrangements within 30 days of receipt. Please call Eleanor M. Spuhler at The NAEPC Foundation office with any questions. Thank you!

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Sign us up!

Council Name____

Contact Name____

Contact Position within Council (circle one): Administrator Officer Board Member Other

Contact Phone______________________________ Contact E-Mail____

Has the council used the no charge speaker program before ? yes no

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Preferred Speaker & Month (you may include a first and second choice):

___Robert G. Alexander, JD, LL.M., AEP®, EPLS

_____ September 2010	_____October 2010	_____November 2010	_____December 2010
_____January 2011	_____February 2011	_____March 2011	_____April 2011
_____May 2011	_____June 2011	_____July 2011	_____August 2011

___Robert E. Burton, CLU®, ChFC®, AEP®, LL.B.

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___Joseph V. Falanga, CPA, AEP®

Preferred Month (please complete)____

___Michael W. Halloran, CLU®, ChFC, AEP®, CFP®, REBC, RHU, LUTCF, MSFS, MSM

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___Clark B. McCleary, CLU®, ChFC®, MSFS, AEP®

Preferred Month (please complete)____