



National Association of Estate Planners & Councils
 1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

National Speakers Bureau Information Package

A copy of all or a part of this information will be available on the NAEPC website, www.naepc.org. Please type or print your responses and email this sheet to Eleanor M. Spuhler at admin@naepc.org. Please include "Application for online speakers bureau" in the subject line.

Personal Information

Name: **John J. ("Jeff") Scroggin**

Date Submitted: **August 1, 2008**

Professional Designations (check all that apply):

Attorney **XX**, CPA __, TO __, CLU __, CFP® __, ChFC __ AEP **XX** Other: _____

Member of the following estate planning council(s): **Atlanta & North Georgia**

Firm Name: **Scroggin & Company**

Address: **647 Mimosa Blvd, Roswell GA 30075**

Work Phone: **770-640-1101**

Fax: **770-518-4124**

Email: **John @scrogginlaw.com**

Website: www.scrogginlaw.com

Name and contact information for the person that should be contacted at your office for questions or inquiries about potential speaking engagements: **LuAnn Rossi**

Speaking Information

Please list the most significant speaking engagements in the last three years:

Date	Sponsor	Topic
January 2009	International Forum (Los Angeles)	"Avoiding the Inevitables in a Family Business"
January 2009	MetLife Insurance (LA, Philadelphia, Chicago)	"Creative Planning Ideas"
September 2008	FPA National Convention (Boston)	"Planning after the Election"
September 2008	Schwab National Meeting - Impact Program	"Planning after the Election"
March 2008	University of Florida Law School LL.M. Tax Program	"The Future of Estate Planning"
January 2008	MetLife Insurance (San Diego, Chicago, Boston)	"Unexpected Uses of Life Insurance in Estate Planning"
September 2007	FPA National Convention (Seattle)	"Creative Estate Planning"
June 2007	Million Dollar Round Table (Denver)	"Estate and Insurance Planning: Opportunities When Estate Taxes Don't Matter"
October 2006	FPA National Convention (Nashville)	"Reviewing Estate Planning Documents"
February 2006	State Bar of Georgia Estate Planning Institute	"Does Income Tax Planning Trump Estate Tax Avoidance?"
October 2005	SFSP National Convention (Phoenix)	"Avoiding Common Mistakes in Creating, Operating and Transferring a Business"
September, 2005	FPA National Convention (San Diego)	"Hot Topics in Estate Planning."

Do you have presentation references that local EPCs can contact (list name, organization and phone number)?



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Steve Leimberg, steve@leimbergservices.com

Steve McDaniel, Attorney, (901) 312-7970

Diane McAfee, Financial Planning Association, (303)867-7117

Tom Forest, Schwab Trust, (302) 622-3616

Jack Schilt, Former President of Enterprise Funds, (404)915-9984

List locations of the estate planning councils to whom you have talked in the last three years:

Charlotte, Southwest Florida (Sarasota), Northwest Florida (Pensacola), Spokane, Northern Arkansas, Martin County (Stuart, FL), North Michigan, St Louis, Naples, Philadelphia, Chattanooga, Atlanta, North Georgia, Salt Lake City, North Alabama (Birmingham), Detroit, Winston Salem

On average, how many times a year to you speak (to groups outside your own firm):

10-15 within a fifty mile radius of your office ~ 15-20 more than fifty miles from your office

Have you written any (list the number): 200+ articles 3 books, 3 pamphlets

In what publications have you been quoted in the last five years (not as an author):

- Wall Street Journal (2004, 2005, 2006, 2007)
- The Miami Herald (2004)
- New York Times International (2005)
- The New York Times (2005)
- Herald Tribune (2004)
- Investment News (2006)
- Chicago Tribune (2007)
- Cleveland Business Journal (2007)
- Money Magazine (2005)
- Seattle-Post-Intelligencer (2007)
- Medical Economics (2005, 2007)
- Smart Money Magazine (2003, 2005)
- Bloomberg Wealth Management (2004)
- Kiplingers' Retirement Report (2008)

Do your presentations generally include (check those that apply):

XX a detailed outline XX PowerPoint slides XX Other: **Materials for Future Research**

What requirements do you have for speaking?

XX LCD projector XX lavalier microphone ___ overhead projector
___ flip chart ___ Other (list): _____

Do you charge for speaking (over your coach-class travel, lodging and meal costs)? Yes XX No ___

If yes, what is the range of fees? **\$2,500-5,000 per day**

List any other cost requirements (e.g., first class air): **Coach Class M or B**

Please provide information on your unique talents & background for speaking:

- University of Florida, Masters of Law in Taxation (LL.M.), 1979
- Former CPA with Arthur Andersen & Company
- Founding Editor, NAEPC Journal of Estate and Tax Planning (an Internet Publication of the National Association of Estate Planners and Councils) 2006-present (www.NAEPC.org)
- Member of the Board of Directors, National Association of Estate Planners & Councils, 2001-present; Co-Chairman, Long Range Planning Committee; Chairman, Publications Committee
- Co-Editor, Commerce Clearing House's Practical Estate Planning Magazine, 2004-2006
- Martindale Hubbell Attorneys' Rating: "AV" (highest rating possible)
- Estate Planning Council of North Georgia Board of Directors (2000-2006) & President (2002-2005)
- Adjunct Professor - Tax Law, University of Florida College of Business, 1978-1979
- Website Recommended (for Estate Planning) by AICPA Journal of Accountancy, June 2001
- Certified Financial Planning Board of Examiners Best Planning Article Award for 2000



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- Estate Planning Columnist, Advisor Today Magazine, 1998-present; Contributing Writer, National Underwriter.
- Program Chairman, Georgia ICLE Annual Program on Representing Closely Held Businesses, 1997-2003.
- Member of State Bar of Georgia Total Return Trust Legislation Committee, 2002-2005.
- Co-Creator of the "Family Incentive Trust"® and Creator of the "Family Love Letter"®
- Member, Board of Directors of North Fulton Community Foundation, 2003-present; Chairman 2008-2010
- Owner of one of the Largest Private Collections of Tax Memorabilia in the US

Topics for Presentations - please check those that apply

Tax Planning

- State Income Taxes
- Federal Income Taxes
- Federal Transfer Taxes
- Generation Skipping Taxes
- State Transfer Taxes
- International Taxes
- Other Tax Issues:
 - * **The Changing Nature of Taxes & Estate Planning**

Estate Planning

- General Estate Planning
- Current Update on Recent Estate Planning Changes
- Trends in Estate Planning
- Planning for Gifts (e.g., exemptions, annual exclusions, 529 Plans)
- State Specific Estate Planning. List States: **Georgia**
- Life Insurance in Estate Planning
- Financial Decision Making in an Estate Plan
- Planning for Retirement Plans, IRAs & Other Employee Benefits
- Asset Protection Planning
- Valuation Issues in Estate Planning
- The Psychology of Planning
- Partnerships, LLCs and Entity Planning
- Planning for Divorce and/or Second Marriages
- Planning for Resident Aliens and Non-Resident Aliens
- Planning for Americans Living Overseas
- Other:

Trusts & Estates

- Testamentary Trusts
- Revocable Trusts
- Lifetime Irrevocable Trusts
- Life Insurance Trusts
- Defective Trusts
- Dynasty Trusts



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- XX S Corporation Trusts
- XX Charitable Trusts
- XX Incentive Trusts
- XX Minor Trusts
- XX Special Needs Trusts
- XX Income Tax Planning for Estates and Trusts
- XX Avoiding Common Mistakes in Estates and Trusts
- XX Choosing Fiduciaries
- ___ Other: _____

Charitable Planning

- XX Using Charitable Trusts
- XX Planning for Charitable Transfers
- XX Private Foundations, Donor Advised Funds, Supporting Organizations, Endowments
- XX Life Insurance in Charitable Planning
- ___ Other: _____

Elder Law Issues

- ___ Entitlement Programs
- ___ Long Term Care
- XX Incapacity Planning
- XX Other: _____

Business Succession Issues

- XX Family Business Succession Planning
- XX Exit Planning
- XX Buy-Sell Agreements
- XX Other: **Common Mistakes in Creating, Operating and Selling a Business**

Other Topics

- XX Speaking and Writing to Grow your Estate Planning Practice
- XX Effective Networking
- XX Working with other Professionals
- XX Other: **The Humorous Side of Taxes**

List the names of some of your most interesting presentations:

- **What Happens After The 2008 Election? Understanding The Possibilities And The Planning**
- **The Creative Uses Of Defective Trusts**
- **Estate Planning Is Not About Death & Taxes - It Is About The Legacy You Leave Behind**
- **The Future Of Estate Planning – It's Not Dying, It's Just Evolving**
- **Estate And Tax Planning From 2008-2011 – Confusion Reins!**
- **Baby Boomer Planning – The Unique Issues**
- **Using Revocable Trusts In Estate Planning**
- **20 Tax, Insurance & Estate Planning Ideas You May Never Have Heard About**