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: Natalie B. Choate Date Submitted: 9/17/08

Professional Designations (check all that apply):
Attorney ✓, CPA___, TO___, CLU___, CFP®___, ChFC___ AEP___ Other: ________

Member of the following estate planning council(s): Boston Bar Estate Planning Committee

Firm Name: Nutter McClennen & Fish LLP

Address: 155 Seaport Boulevard, Boston, MA 02210-2604

Work Phone: 617-439-2995 Fax: 617-310-9000

Email: NatalieChoate@aol.com Website: www.ataxplan.com

Name and contact information for the person that should be contacted at your office for questions or inquiries about potential speaking engagements: Ian M. Starr, WTCW-NMF, 155 Seaport Boulevard, Boston, MA 02210 617-439-2899 IANSTARR@comcast.net

Speaking Information

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

Date	Sponsor	Topic

Do you have presentation references that local EPCs can contact (list name, organization and phone number)? Jim Whitesell, ICIEF, 317-637-9102, ext. 226
Tonya Glass, 1st Global, 800-959-8440, ext. 351
Ann McKenna, FPA of Pittsburgh, 412-653-1054

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List locations of the estate planning councils to whom you have talked in the last three years: Sacramento CA; Portland OR; Bristol Cty MA; Central AZ; Savannah GA; Pittsburgh PA; Eastern NY; NAEPC; Winston-Salem NC; Boston MA; Central NY; Dallas TX;

On average, how many times a year to you speak (to groups outside your own firm):
5 within a fifty mile radius of your office ~ 40 more than fifty miles from your office

Have you written any (list the number): 25+ articles 2 books

In what publications have you been quoted in the last five years (not as an author): Wall Street Journal, Money, Bloomberg Wealth Manager, Newsweek, Forbes, Financial Planning and Financial World

Do your presentations generally include (check those that apply):
✓ a detailed outline ___ PowerPoint slides ___ Other: ___

What requirements do you have for speaking?
___ LCD projector ✓ lavaliere microphone ___ overhead projector
___ flip chart ___ Other (list): ___

Do you charge for speaking (over your coach-class travel, lodging and meal costs)? Yes ✓ No ___
If yes, what is the range of fees? $5,500 - $13,500
List any other cost requirements (e.g., first class air): First Class Air for travel over 400 miles from Boston

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

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: Estate + Distribution Planning for Retirement Benefits

Telephone (866) 226-2224 www.naepc.org admin@naepc.org Facsimile (216) 696-2582

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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: ____________
- ____ 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
- ____ S Corporation Trusts
- ____ Charitable Trusts
- ____ Incentive Trusts
- ____ Minor Trusts
- ____ Special Needs Trusts
- ____ Income Tax Planning for Estates and Trusts
- ____ Avoiding Common Mistakes in Estates and Trusts
- ____ Choosing Fiduciaries
- ✓ Other: Qualified Personal Residence trusts (QPRTs)

Charitable Planning

- ____ Using Charitable Trusts
- ____ Planning for Charitable Transfers
- ____ Private Foundations, Donor Advised Funds, Supporting Organizations, Endowments
- ____ Life Insurance in Charitable Planning
- ✓ Other: Charitable Giving with Retirement Benefits

Elder Law Issues

- ____ Entitlement Programs
- ____ Long Term Care
- ____ Incapacity Planning
- ____ Other: ____________

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Business Succession Issues

_____ Family Business Succession Planning
_____ Exit Planning
_____ Buy-Sell Agreements
_____ Other: ______________________________

Other Topics

_____ Speaking and Writing to Grow your Estate Planning Practice
_____ Effective Networking
_____ Working with other Professionals
_____ Other: ______________________________

List the names of some of your most interesting presentations:

100 Best + Worst Planning Ideas for Retirement Benefits

See complete list at www.ataxplan.com

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