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: HOWARD D. ROSEN Date Submitted: 7/29/08

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

Member of the following estate planning council(s): ________

Firm Name: DONLEVY-ROSEN & ROSEN, P.A.

Address: 2121 PONCE DE LEON BLVD #320, CORAL GABLES, FL 33134

Work Phone: 3054470061 Fax: 3054479888

Email: ________ Website: PROTECTYOU.COM

Name and contact information for the person that should be contacted at your office for questions or inquiries about potential speaking engagements: HOWARD D. ROSEN 3054470061 X2

Speaking Information

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

Date	Sponsor	Topic
NOV 2005	WASH. STATE BAR	ASSET PROTECTION PLANNING
FEB 2007	NEV. STATE BAR	ASSET PROTECTION PL
OCT 2006	MICH. ASSOC. OF CPA'S	ASSET PROTECTION PL
APR. 2008	FIN. PL. ASSOC. - S. FLA.	ASSET PROTECTION PL
NOV 2008	HEART OF AMER. TAX INST	ASSET PROTECTION PL

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

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

____

____

On average, how many times a year to you speak (to groups outside your own firm):
3 within a fifty mile radius of your office ~ 10 more than fifty miles from your office

Have you written any (list the number): ✓ articles MANY ✓ books 2

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

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? ____________
List any other cost requirements (e.g., first class air): ____________

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

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:
✓ ASSET PROTECTION PLANNING

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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: ________________

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Charitable Planning

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

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Elder Law Issues

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

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

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Business Succession Issues

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

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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:

____
____
____
____
____
____
____