



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: BONNIE L. MACKEN Date Submitted: 8/25/08

Professional Designations (check all that apply):

Attorney , CPA , TO , CLU , CFP® , ChFC , AEP Other: CSEP

Member of the following estate planning council(s): NDSB Estate Planning Council

Firm Name: LEVIN, SILVEY, ZELKO & MACKEN, PA

Address: 2699 STIRLING RD, B-205

Work Phone: (954) 985-8808, EXT 112 Fax: (954) 985-8839

Email: MACKEN/CPA@AOL.COM Website: WWW.LSZCPA.COM

Name and contact information for the person that should be contacted at your office for questions or inquiries about potential speaking engagements: BONNIE L. MACKEN

Speaking Information

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

Date	Sponsor	Topic
<u>VARIOUS</u>	<u>BECKER Review</u>	<u>TEACHER/SPEAKER CPA REVIEW</u>
<u>VARIOUS</u>	<u>INTUIT</u>	<u>QUICKBOOKS BULLET PROOFING & STARTUP</u>
<u>VARIOUS</u>	<u>FICPA-GOLDCAST</u>	<u>Tax Tips & AIA topic</u>
<u>Various</u>	<u>FICPA Ethics (reg'd)</u>	<u>Facilitator since 2006</u>
<u>VARIOUS</u>	<u>Alpha Kappa Psi</u>	<u>Bulletproofing Books</u>

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

- Marcie Bour, CPA, BVA 954-966-7465 x. 11 (FICPA/AWSCPA)
- Wendy Lewis, CPA 713-622-9933 (AWSCPA)
- Robert Zelko, CPA 954-985-8808 x. 104 (LSZM)
- David Horowitz of Intuit 450-944-5781
- Frank Olney, CPA - Broward Chapter FICPA 954-527-4335
- Alex Perdomo - Pres. Alpha Kappa 305-552-3778

(Fin. Anal.)



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

NDSB Estate Planning Council

On average, how many times a year do you speak (to groups outside your own firm): 20-30 times
 within a fifty mile radius of your office ~ more than fifty miles from your office

Have you written any (list the number): 5+ articles 1 books Contributor
1-2 Conventions

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

See articles on website - www.152cpa.com

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

a detailed outline PowerPoint slides Other: _____

What requirements do you have for speaking? Self contained

LCD projector lavalier 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? \$100/hr

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

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

See attached surveys & emails

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:

Annual Tax Tips & Highlights
Power of App. (next pg)



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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

- | | |
|---|--|
| <input type="checkbox"/> Testamentary Trusts | <input checked="" type="checkbox"/> Special Needs Trusts |
| <input type="checkbox"/> Revocable Trusts | <input checked="" type="checkbox"/> Income Tax Planning for Estates and Trusts |
| <input type="checkbox"/> Lifetime Irrevocable Trusts | <input type="checkbox"/> Avoiding Common Mistakes in Estates and Trusts |
| <input type="checkbox"/> Life Insurance Trusts | <input type="checkbox"/> Choosing Fiduciaries |
| <input type="checkbox"/> Defective Trusts | <input checked="" type="checkbox"/> Other: <u>powers of appt.</u> |
| <input type="checkbox"/> Dynasty Trusts | _____ |
| <input type="checkbox"/> S Corporation Trusts | _____ |
| <input checked="" type="checkbox"/> Charitable Trusts | |
| <input type="checkbox"/> Incentive Trusts | |
| <input checked="" type="checkbox"/> Minor Trusts | |

Charitable Planning

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

Elder Law Issues

- Entitlement Programs
- Long Term Care
- Incapacity Planning
- Other: guardianship acctg.
- Fiduciary Ethics



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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:

Bulletproofing Books - Segregation of Duties
Dress For Success w/ Policies + Procedures Webcast

