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: William R. Cousins III Date Submitted: 9/5/08

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

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

Firm Name: Meadows, Collier, Reed, Cousins & Blau, L.L.P.

Address: 901 Main Street, Suite 3700, Dallas, Texas 75202

Work Phone: 214/744-3700 Fax: 214/747-3732

Email: tcousins@meadowscollier.com Website: www.meadowscollier.com

Name and contact information for the person that should be contacted at your office for questions or inquiries about potential speaking engagements: Susan House, 214/744-3700

Speaking Information

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

Date	Sponsor	Topic
See attached list.		

Do you have presentation references that local EPCs can contact (list name, organization and phone number)? Andy Edwards, Texas Society of CPAs, 972/687-8691

National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

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

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 ~ 15 more than fifty miles from your office

Have you written any (list the number): ____ articles ____ books

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

Do your presentations generally include (check those that apply):
X a detailed outline X 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 X
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:

Topics for Presentations - please check those that apply

Tax Planning
- ____ State Income Taxes
- X Federal Income Taxes
- X Federal Transfer Taxes
- ____ Generation Skipping Taxes
- ____ State Transfer Taxes
- ____ International Taxes
- ____ Other Tax Issues:

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

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
- X 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
- X Other: 1) Estate & Gift Tax Audits, Appeals and Litigation; 2) Family Limited Partnerships

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: ____________

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: ____________

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

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:

See attached list.