



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: Dr. Kenneth Eugene Lehrer Date Submitted: July 28, 2008

Professional Designations (check all that apply):

Attorney , CPA , TO , CLU , CFP® , ChFC AEP Other: Doctorate (Economics)

Member of the following estate planning council(s): None

Firm Name: Lehrer Financial and Economic Advisory Services

Address: 5555 Del Monte Drive - Suite 802 Houston, Texas 77056

Work Phone: (713) 972-7912 Fax: (713) 964-0444

Email: drken@lehecoserv.com Website: www.lehecoserv.com

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

Dr. Kenneth Eugene Lehrer (713) 972-7912

Speaking Information

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

Date	Sponsor	Topic
<u>Nov, 2007</u>	<u>Allied Mineral Products</u>	<u>Economic Outlook</u>
<u>April, 2007</u>	<u>Information Strategies, Inc</u>	<u>Economic Outlook</u>
<u>Feb. 2008</u>	<u>CREN (local real estate group)</u>	<u>Economic Outlook</u>

Note: I have given at least two(2) dozen talks on the Economic Outlook to local business groups over the last three (3) years.

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

Donald P Mazzella (201) 941-2252
Laurence H Bernell (713) 861-3110



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

_____ None _____

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

6 within a fifty mile radius of your office ~ 3 more than fifty miles from your office

Have you written any (list the number): 1 articles 0 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):

_____ a detailed outline PowerPoint slides _____ Other: _____

What requirements do you have for speaking?

_____ 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? Depends on the group and my involvement

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

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

_____ Always receive good feedback and have received
_____ several requests for repeat talks on the overall
_____ US economy over the past 20 years.

Topics for Presentations - please check those that apply

Tax Planning

_____ State Income Taxes _____ International Taxes
_____ Federal Income Taxes _____ Other Tax Issues:
_____ Federal Transfer Taxes _____
_____ Generation Skipping Taxes _____
_____ State Transfer Taxes _____



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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 type="checkbox"/> Special Needs Trusts |
| <input type="checkbox"/> Revocable Trusts | <input 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 type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Dynasty Trusts | _____ |
| <input type="checkbox"/> S Corporation Trusts | _____ |
| <input type="checkbox"/> Charitable Trusts | _____ |
| <input type="checkbox"/> Incentive Trusts | _____ |
| <input 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: _____



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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:

ALWAYS TALK ON: _____

_____ State and Futures: the General / Overall US Economy

_____ State and Future of US Real Estate Economy
