



**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](http://www.naepc.org). Please type or print your responses and email this sheet to Eleanor M. Spuhler at [admin@naepc.org](mailto:admin@naepc.org). Please include "application for online speakers bureau" in the subject line.*

**Personal Information**

Name: Joel Weintraub      Date Submitted: 1/20/09

Professional Designations (check all that apply):

Attorney \_\_, CPA \_\_, TO \_\_, CLU \_\_, CFP® \_\_, ChFC \_\_ AEP \_\_ Other: M.Ed

Member of the following estate planning council(s): \_\_\_\_\_

Firm Name: Humor for the Health of it

Address: 38 White Pine Court  
 Lafayette Hill, PA 19444

Work Phone: 610-825-2179 Fax: \_\_\_\_\_

Email: [joel@healthhumor.com](mailto:joel@healthhumor.com) Website: [www.healthhumor.com](http://www.healthhumor.com)

Name and contact information for the person that should be contacted at your office for questions or inquiries about potential speaking engagements: Joel Weintraub 610-825-2179

**Speaking Information**

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

<b>Date</b>	<b>Sponsor</b>	<b>Topic</b>
	World Bank	How to Change from a State of Depression and Anxiety to One of Happiness, Hope and Productivity
	National Institutes of Health	Humor for the Health of it
	Urban Superintendents Association	Don't Stress Over a Poor Economy _____



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Do you have presentation references that local EPCs can contact (list name, organization and phone number)? I will send letters of reference

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

Bucks County  
Lehigh County  
Mercer County

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

30 within a fifty mile radius of your office ~ 80 more than fifty miles from your office

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

In what publications have you been quoted in the last five years (not as an author): Johns Hopkins, Intellihealth, Philadelphia Inquirer \_\_\_\_\_

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

  x   a detailed outline   x   PowerPoint slides      Other:

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What requirements do you have for speaking?

  x   LCD projector   x   lavalier microphone      overhead projector  
     flip chart      Other (list): \_\_\_\_\_

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Do you charge for speaking (over your coach-class travel, lodging and meal costs)? Yes   x   No     

If yes, what is the range of fees?   \$800 - \$1100

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

Please provide information on your unique talents & background for speaking: I combine humor with information so my audiences have the opportunity to laugh and learn.

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**Topics for Presentations** - please check those that apply

**Tax Planning**

- |  |  |
|--|--|
| <input type="checkbox"/> State Income Taxes        | <input type="checkbox"/> International Taxes |
| <input type="checkbox"/> Federal Income Taxes      | <input type="checkbox"/> Other Tax Issues:   |
| <input type="checkbox"/> Federal Transfer Taxes    | _____  |
| <input type="checkbox"/> Generation Skipping Taxes | _____  |
| <input type="checkbox"/> State Transfer Taxes      | _____  |

**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: How to Change from a State of Depression and Anxiety to One of Happiness, Hope and Productivity

Reducing Stress and Getting Along with Others During the Estate Planning Process

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**Trusts & Estates**

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|--|---|
| <input type="checkbox"/> Testamentary Trusts         | <input type="checkbox"/> Defective Trusts     |
| <input type="checkbox"/> Revocable Trusts            | <input type="checkbox"/> Dynasty Trusts       |
| <input type="checkbox"/> Lifetime Irrevocable Trusts | <input type="checkbox"/> S Corporation Trusts |
| <input type="checkbox"/> Life Insurance Trusts       | <input type="checkbox"/> Charitable Trusts    |



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- 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: \_\_\_\_\_

## 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: \_\_\_\_\_ See attached

List the names of some of your most interesting presentations: \_\_\_\_\_ See attached

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