



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: A. Stephen McDaniel Date Submitted: 8/08

Professional Designations (check all that apply):

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

Member of the following estate planning council(s): Memphis TN

Firm Name: Williams, McDaniel, Wolfe & Womack P.C.

Address: 5521 MURRAY Memphis TN 38119

Work Phone: 901-767-8200 Fax: 901-767-8220

Email: SMcDaniel@WMWD.COM Website: WMWD.COM

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

Speaking Information

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

Date	Sponsor	Topic
	<u>See attached</u>	<u>Topics are utilizing disclaimers in an uncertain estate planning environment. Post mortem elections, generation skipping planning, life insurance trusts challenges facing the estate planner world.</u>

Do you have presentation references that local EPCs can contact (list name, organization and phone number)? No, but feel free to contact the Administrative person at any counsel I have spoken to



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

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

5 within a fifty mile radius of your office ~ 5 more than fifty miles from your office

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

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

I don't know. US A Today, Wall Street Journal
Memphis Commercial Appeal, Memphis Business 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 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? \$2,000 - \$5000

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

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

I have good jokes

Topics for Presentations - please check those that apply

Tax Planning

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



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
- 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 checked="" 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: _____



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 FIRST page but
the disclaimer presentation & the
challenges presentation have been
well received