



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: Paula M. Jones Date Submitted: 8/20/08

Professional Designations (check all that apply):

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

Member of the following estate planning council(s): Chester County EP Council (Past President), Philadelphia EP Council

Firm Name: McCarter & English, LLP

Address: Mellon Bank Center, Suite 700, 1735 Market Street, Philadelphia, PA 19103

Work Phone: 215.979.3844 Fax: 215-988-4336

Email: pjones@mccarter.com Website: www.mccarter.com

Name and contact information for the person that should be contacted at your office for questions or inquiries about potential speaking engagements: self or Dorothy Weiler dweiler@mccarter.com or 215.979.3800

Speaking Information

Please list the most significant speaking engagements in the last three years: *All answers refer to speaking on the topic of International Estate Planning only*

Date	Sponsor	Topic
Spring 2005-present	Temple School of Law, Graduate Tax Program	International Estate Planning
Feb. 2008	Delaware County EP Council	International Estate Planning
Jan. 2007	Bucks County EP Council	International Estate Planning
Dec. 2006	Pennsylvania Bar Institute	Legal Issues for the International Executive
March 2007	Philadelphia Bar Association	International Estate Planning



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Do you have presentation references that local EPCs can contact (list name, organization and phone number)? Kathy Mandelbaum, Dean, Graduate Tax Program, Temple Univ. School of Law (215) 204-5382; Terri Smith, Wachovia Wealth Management, (610) 436-7869; Hilary Martin, Main Line School Night, (610) 687-0460

List locations of the estate planning councils to whom you have talked in the last three years: Doylestown, PA; Media, PA; Norristown, PA

On average, how many times a year do you speak (to groups outside your own firm):
5-6 within a fifty mile radius of your office ~ 3-4 more than fifty miles from your office

Have you written any (list the number): 12-15 articles 1 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? \$1500-\$4000
 List any other cost requirements (e.g., first class air): _____

Please provide information on your unique talents & background for speaking:
I grew up in a family of 5 people from 4 different countries and therefore have insight from both the multinational client's perspective and a practitioner's perspective. My lectures give a profile of the multinational client (including the misconceptions about them) so my audience of practitioners can be aware of, and can market to, this quickly-growing group of potential clients.

Topics for Presentations - please check those that apply

- Tax Planning
- | | |
|--|---|
| <input type="checkbox"/> State Income Taxes | <input checked="" 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 | _____ |



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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: pre-immigration planning
- Other: purchasing real estate abroad/planning for non-resident alien purchases of U.S. real estate

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: Marketing to the International Estate Planning Client

List the names of some of your most interesting presentations:

Planning for the Multinational Executive

Overview of International Estate Planning

Where Shall I Go? Residency Issues in International Estate Planning

Strategies for Tax Efficient Global Philanthropy

Role of Tax Treaties in Estate Administration