



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: Gerald LeVan Date Submitted: 8/4/08

Professional Designations (check all that apply):

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

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

Firm Name: The LeVan Company

Address: P.O. Box 10, Black Mountain, NC 28711

Work Phone: 828-669-0131 Fax: 828-669-1397

Email: levan@levanco.com Website: levanco.com

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

Speaking Information

See attached

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

Date	Sponsor	Topic
<u>2/1/07</u>	<u>Dallas EPC</u>	<u>Feuds, Flashpoints & Family Councils</u>
<u>10/16/07</u>	<u>Palm Beach EPC</u>	<u>" "</u>
<u>6/17/08</u>	<u>Shreveport EPC</u>	<u>Healthy Wealth</u>

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



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

Dallas, Palm Beach, FL, Shreveport, LA, Orange
County, CA, Western Michigan

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

Have you written any (list the number): 40 articles 6 books

In what publications have you been quoted in the last five years (not as an author): Estate Planning
Journal, Wall Street Journal, Journal of
Personal Estate Planning, Financial Times of
London

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?*

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

* usually accept customary honorarium

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

Family wealth mediator (since 1986); ACTEC
Fellow; Law professor (LSU 1971-1983 - Taxation)

Presentations emphasize personal and
family dynamics of estate planning

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 | _____ |

see attached



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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:

see attached