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: Scott T. Wait Date Submitted: 8-27-08

Professional Designations (check all that apply):
Attorney ___, CPA X, TO___, CLU___, CFP®___, ChFC___ AEP___ Other: ________

Member of the following estate planning council(s): Northern Nevada Estate Planning Council

Firm Name: RS Wait, chtd.

Address: 6566 S. McCarran Blvd., Ste A, Reno, NV 89509

Work Phone: 775-825-7337 Fax: 775-825-7745

Email: scott@rswait.com Website: www.rswait.com

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

Speaking Information

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

Date	Sponsor	Topic
01-11-06	Financial Planners of No. Nevada	Creating a Business Transition Team
05-17-06	NNSEA - Northern NV Society of EAs	Business Transition Planning
02-20-07	NAIFA	Secrets to Understanding Tax Return
10-25-07	ROCG	How much is your Business Worth?
07-14-08	Reno Sparks Chamber	Getting the Most from Your Banker Relationship

Do you have presentation references that local EPCs can contact (list name, organization and phone number)? Financial Planners of Nor. NV - Heidi Foster, 775-823-4879, NAIFA - Jim Myers - 775-338-9658, NNSEA - Karen Washburn 775-746-3206, Reno Sparks Chamber, Doug Kurkul 775-337-3030

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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 to you speak (to groups outside your own firm):

2 within a fifty mile radius of your office ~ 0 more than fifty miles from your office

Have you written any (list the number): 52 articles 0 books

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

Northern Nevada Business Weekly, Tahoe Tribune

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

X a detailed outline X PowerPoint slides ____ Other: ____

What requirements do you have for speaking?

X LCD projector ____ lavaliere microphone ____ overhead projector

____ flip chart ____ Other (list): ____

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

If yes, what is the range of fees? ____

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

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

I Am a Current Toastmaster since 1992 with ACB designation - (Accomplished Communicator Bronze)

Topics for Presentations - please check those that apply

Tax Planning

____ State Income Taxes

____ Federal Income Taxes

____ Federal Transfer Taxes

____ Generation Skipping Taxes

____ State Transfer Taxes

____ International Taxes

____ Other Tax Issues:

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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
_X_ 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

____ Testamentary Trusts
____ Revocable Trusts
____ Lifetime Irrevocable Trusts
____ Life Insurance Trusts
____ Defective Trusts
____ Dynasty Trusts
____ S Corporation Trusts
____ Charitable Trusts
____ 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: ____________________

Telephone (866) 226-2224 www.naepc.org admin@naepc.org Facsimile (216) 696-2582

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Business Succession Issues

- X Family Business Succession Planning
- X Exit Planning
- ___ Buy-Sell Agreements
- X Other: Business Valuation Issues, Merger & Acquisition of Middle Market Companies

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:

1) How much is your Business Worth? ... And will it fund your Retirement?

2) Family Business Succession

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