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: Michael W. Halloran 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): REBC, RHU, LUTCF, MSFS, MSM

Firm Name: Northwestern Mutual Financial Network

Address: 1301 Riverplace Blvd. Suite 2540

Work Phone: 904-399-8308 Fax: 904-399-8464

Email: nmlmike e aol.com Website: www.nmfn.com/mikehalloran

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

Speaking Information

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

Date	Sponsor	Topic
02/2008	Case Western Reserve	Financial Security Planning
2007	LSU	Financial Planning for Physicians
06/2006	Mayo Clinic	Financial Planning for Residents + Fellows
12/2006	University of Florida	Financial Security Planning

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:
Northwest Arkansas EPC, Chattanooga Tennessee EPC, Rocky Mountain EPC, Palm Coast EPC, Northwest Florida EPC, Tallahassee Regional EPC.

On average, how many times a year to you speak (to groups outside your own firm):
7 within a fifty mile radius of your office ~ 13 more than fifty miles from your office

Have you written any (list the number): 2 articles 0 books

In what publications have you been quoted in the last five years (not as an author):
National Underwriter Magazine and Money Magazine

Do your presentations generally include (check those that apply):
___ a detailed outline ✓ PowerPoint slides ___ Other: ___

What requirements do you have for speaking?
✓ LCD projector ✓ lavaliere microphone ___ overhead projector
___ flip chart ✓ Other (list): Laptop Computer

Do you charge for speaking (over your coach-class travel, lodging and meal costs)? Yes ✓ No___
If yes, what is the range of fees? $1,000 - $2500 if not a NAEPC Sponsor Talk
List any other cost requirements (e.g., first class air): None

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

Topics for Presentations - please check those that apply

Tax Planning

___ State Income Taxes
X Federal Income Taxes
___ Federal Transfer Taxes
___ Generation Skipping Taxes
___ State Transfer Taxes

___ International Taxes
___ Other Tax Issues:

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Estate Planning

- [x] General Estate Planning
- [ ] Current Update on Recent Estate Planning Changes
- [ ] Trends in Estate Planning
- [x] Planning for Gifts (e.g., exemptions, annual exclusions, 529 Plans)
- [ ] State Specific Estate Planning. List States: ____________
- [x] Life Insurance in Estate Planning
- [ ] Financial Decision Making in an Estate Plan
- [x] 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

- [x] Testamentary Trusts
- [x] Revocable Trusts
- [x] Lifetime Irrevocable Trusts
- [x] Life Insurance Trusts
- [x] Defective Trusts
- [ ] Dynasty Trusts
- [ ] S Corporation Trusts
- [x] 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

- [x] Using Charitable Trusts
- [ ] Planning for Charitable Transfers
- [ ] Private Foundations, Donor Advised Funds, Supporting Organizations, Endowments
- [x] Life Insurance in Charitable Planning
- [ ] Other: ____________

Elder Law Issues

- [ ] Entitlement Programs
- [x] Long Term Care
- [ ] Incapacity Planning
- [ ] Other: ____________

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Business Succession Issues

- X Family Business Succession Planning
- X Exit Planning
- X 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:

Grantor Retained Annuity Trusts,
Charitable Remainder Trusts,
Due Diligence,
Financial Planning.