



# 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](http://www.naepc.org). Please type or print your responses and email this sheet to Eleanor M. Spuhler at [admin@naepc.org](mailto:admin@naepc.org). Please include "application for online speakers bureau" in the subject line.

### Personal Information

Name: Jonathan G. Blattmachr Date Submitted: \_\_\_\_\_

Professional Designations (check all that apply):

Attorney , CPA , TO , CLU , ChFC , AEP  Other: AEP (distinctive)

Member of the following estate planning council(s): New York City

Firm Name: Milbank, Tweed, Hadley & McCloy LLP

Address: 1 Chase Manhattan Plaza

Work Phone: 212-530-5066 Fax: 212-822-5066

Email: jblattma@milbank.com Website: \_\_\_\_\_

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

Laura Graham (212-530-4985) lgraham@milbank.com

### Speaking Information

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

Date	Sponsor	Topic
<u>Jan. 2008</u>	<u>Heckerling</u>	<u>Comparing GRATs &amp; Installment Sales</u>
<u>Oct. 11-12, 2007</u>	<u>Notre Dame</u>	<u>Extra-Crummey Trust What will happen to the transfer tax system in 2010 Supercharged Credit Shelter Trust</u>

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



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

NYC, Eastern NY, St. Louis, Chicago, Palm Beach  
Marlborough, VT, Milwaukee, Washington DC

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

15 within a fifty mile radius of your office ~ 20 more than fifty miles from your office

Have you written any (list the number): 300+ articles 5 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): Handheld microphone

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

If yes, what is the range of fees? \$5,000 - \$10,000

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

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## 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
- 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 checked="" type="checkbox"/> Testamentary Trusts         | <input type="checkbox"/> Special Needs Trusts                                      |
| <input checked="" type="checkbox"/> Revocable Trusts            | <input checked="" type="checkbox"/> Income Tax Planning for Estates and Trusts     |
| <input checked="" type="checkbox"/> Lifetime Irrevocable Trusts | <input checked="" type="checkbox"/> Avoiding Common Mistakes in Estates and Trusts |
| <input checked="" type="checkbox"/> Life Insurance Trusts       | <input type="checkbox"/> Choosing Fiduciaries                                      |
| <input checked="" type="checkbox"/> Defective Trusts            | <input type="checkbox"/> Other: _____  |
| <input checked="" type="checkbox"/> Dynasty Trusts              | _____  |
| <input checked="" type="checkbox"/> S Corporation Trusts        | _____  |
| <input checked="" type="checkbox"/> Charitable Trusts           | _____  |
| <input checked="" type="checkbox"/> Incentive Trusts            | _____  |
| <input checked="" 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:

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