



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: Alan S. Gassman Date Submitted: 8/15/2008

Professional Designations (check all that apply):
 Attorney , CPA , TO , CLU , CFP® , ChFC AEP Other: _____

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

Firm Name: Gassman, Bates & Associates, P.A.

Address: 1245 Court Street, Suite 102, Clearwater, Florida 33756

Work Phone: 727-442-1200 Fax: 727-443-5829

Email: agassman@gassmanpa.com Website: www.gassmanbateslawgroup.com

Name and contact information for the person that should be contacted at your office for questions or inquiries about potential speaking engagements: Maribeth Vongveneko, Assistant to Mr. Gassman, 727-442-1200 x 236, maribeth@gassmanpa.com

Speaking Information

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

Date	Sponsor	Topic
<u>May 2008</u>	<u>Florida Bar Wealth Preservation Conf.</u>	<u>Florida Creditor Exemption Planning</u>
<u>May 2008</u>	<u>Florida Bar Wealth Preservation Conf.</u>	<u>Creditor Planning Under the New Trust Code</u>
<u>2006</u>	<u>Northwest Florida Estate Planning Council</u>	<u>Asset Protection Planning - Hot Topics and Essential Information for the Estate Planner</u>
<u>February 2008</u>	<u>All Children's Hospital Foundation</u>	<u>How Our Trusts Are Different Than They Were Two Years Ago</u>

Do you have presentation references that local EPCs can contact (list name, organization and phone number)? Stephen Timberlake, Pensacola Estate Planning Council, 850-444-1427
Janet Rosenquist, CPA, Pinellas County Estate Planning Council, 727-446-5858



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

Pinellas County Estate Planning Council, Estate Planning Council of the Nature Coast, Manatee County Estate Planning Council, Pensacola County Estate Planning Council, Marion County Estate Planning Council

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

6 within a fifty mile radius of your office ~ 3 more than fifty miles from your office

Have you written any (list the number): 150 articles books

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

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? n/a

List any other cost requirements (e.g., first class air): If outside of the Tampa Bay area a fee may be charged.

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

Our presentations have received the highest ratings by attendee comments. We have been told that attendees are able to understand important concepts, and enjoy coming away with practical strategies and understandings of strategies that they did not have before the presentation. We have worked hard on providing reference materials that are well organized and thorough. Our office works extensively with wealthy individuals, active business owners, and physicians and other professionals. Mr. Gassman is the Co-Chair of two annual Florida Bar Conferences - Representing the Physician and Annual Wealth Protection.

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 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 checked="" type="checkbox"/> Defective Trusts | <input type="checkbox"/> Other: _____ |
| <input checked="" type="checkbox"/> Dynasty Trusts | _____ |
| <input checked="" 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:

Asset Protection Planning - What Every Doctor Should Know

Creditor Planning Under The New Florida Trust Code

Dynamic Strategies For Wealth Preservation

Asset Protection In The Estate Plan