



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: FRANK B. Weisz Date Submitted: 8/2/08

Professional Designations (check all that apply):

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

Member of the following estate planning council(s): Phila.

Firm Name: Weisz & Associates

Address: 5 E. GERMANTOWN Pike Plymouth meeting Pa.

Work Phone: 610-832-0540 Fax: 610-832-0548

Email: FWeisz@WeiszLaw.net Website: _____

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

Speaking Information

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

Date	Sponsor	Topic
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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:

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

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

Have you written any (list the number): ___ articles 10 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): _____

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

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

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

Author of 10 books

TOP of Table Producer for ~ 20 years

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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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: SALES

List the names of some of your most interesting presentations:

- Supertrust
- PLANNING for the AFFLUENT MULTI-MARRIED
- client
- _____
- _____
- _____