



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 RAINALDI Date Submitted: 8/17/08

Professional Designations (check all that apply):
 Attorney , CPA , TO , CLU , CFP® , ChFC ^{DAEP} AEP Other:

Member of the following estate planning council(s): ESSAY COUNTY NS

Firm Name: KUBLER CO

Address: 6 BECKER FARM RD, ROSELAND NS 07068

Work Phone: 973-716-7509 Fax: 973-994-2980

Email: ~~FRANK@KUBLER~~ FRANK@KUBLERSYSTEM.COM Website: WWW.KUBLERSYSTEM.COM

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

Speaking Information

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

Date	Sponsor	Topic
<u>6/08</u>	<u>LPL</u>	<u>2 HRS. ON LIFE INS. PRODUCTS & USE</u>
<u>5/07</u>	<u>SOCIETY OF FSP</u>	<u>3 HRS ESTATE PLANNING, 3 HOURS BUS PLANNING, 2 HOURS RETIREMENT PLANNING</u>
<u>6/06</u>	<u>AAJY</u>	<u>5 HRS AS ABOVE - 12 HOURS</u>
<u>6/07 & 2/08</u>	<u>JOHN HANCOCK</u>	<u>1 HR BUSINESS INS.</u>
<u>5/05</u>	<u>PROSTIAN</u>	<u>3 HOURS ESTATE PLANNING, GRATS ETC</u>
<u>3/08/5/05</u>	<u>CAPITUS FINANCIAL</u>	<u>3 HOURS - EST PLANNING & BUS INS</u>
		<u>2 HRS - ESTATE PLANNING - FIDUCIARY</u>

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

<u>MARK MARON</u>	<u>JOHN HANCOCK</u>	<u>978 689 6730</u>
<u>MARSHALL LIPSON</u>	<u>SOCIETY FSP</u>	<u>1500 927-2427</u>
<u>MARK ROBOVOLSKY</u>	<u>PRV.</u>	<u>973 782-6444</u>
<u>BARBARA LITT</u>	<u>CAPITUS FINANCIAL</u>	<u>818 702-0884</u>
<u>LISA POWELL</u>	<u>GUARDIAN</u>	<u>1500 876 7780 7384</u>
<u>GARY FLORES</u>	<u>NABILE</u>	<u>1500 225-2224</u>



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

N.A.S. BOBBIN COUNTY CEMENT ASSOCIATION

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

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

Have you written any (list the number): articles 5 books

*ESTATE PLANNING
BUSINESS PLANNING
RETIREMENT PLANNING
FAMILY TRUST PLANNING
LIFE INS. PRODUCTS*

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

SOCIETY OF CPA, TV SHOW POWER LUNCH WITH BILL CRIBBETH

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

a detailed outline PowerPoint slides Other:

FROM TECHNICAL BOOKS

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? \$3,000 to \$5,000

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

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

ABILITY TO COVER COMPLEX SUBJECTS IN EASY TO UNDERSTAND MANNER

OUR TECHNICAL BOOKS ARE BASED ON MINI CASE PROBLEMS WHICH

BRING REAL LIFE EXAMPLES AND PRACTICAL EVERY DAY CASES

COVER 500 CASE PROBLEMS IN OUR 5 TECHNICAL BOOKS

WITH 40 YEARS OF FIELD & HQ (DIRECTION OF EDUCATION) EXPERIENCE

WE HAVE MANY STORIES & EXAMPLES

GIVEN AS MANY AS 10-12 PROGRAMS IN A YEAR FOR JH, PAO, MY LIFE

NUMBER OF KOLERA SYSTEM - 5 BOOKS, SOFTWARE, ETC. OR.

*MASS MANUAL
ETC.*

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: NY, NJ, CT
- 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 checked="" type="checkbox"/> Special Needs Trusts |
| <input checked="" type="checkbox"/> Revocable Trusts | <input type="checkbox"/> Income Tax Planning for Estates and Trusts |
| <input checked="" type="checkbox"/> Lifetime Irrevocable Trusts | <input 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: <u>GRATS, CLUT, APARTOS</u> |
| <input checked="" type="checkbox"/> Dynasty Trusts | _____ |
| <input checked="" type="checkbox"/> S Corporation Trusts | _____ |
| <input checked="" 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: Tax Aspects of Corp. Redemption, S Corp etc.

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:

- IRC SOLUTIONS TO ESTATE EXCLUSIONS
- FLPS & IRC 2036 PROBLEMS
- MAKING GRAT MORE USEFUL TO CLIENTS
- GST PLANNING
- ANALYSIS OF NO-LAPSE PREMIUM PRODUCTS
- QRP VISA GOOD EST. PLANNING VS GOOD RETIREMENT PLANNING - STRENGTH OUTER
- USING LIFE INS TO FUND RET. PLANNING