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: John L. Olsen Date Submitted: 12 AUG 2008

Professional Designations (check all that apply): Attorney ___, CPA___, TO___, CLU X, CFP®___, ChFC X AEP X Other: _____

Member of the following estate planning council(s): St. Louis (MO)

Firm Name: Olsen Financial Group

Address: 131 Hollywood Lane / Kirkwood, MO 63122-2901

Work Phone: 314·909·8818 Fax: 314·909·7912

Email: jolsen02@earthlink.net Website: N/A

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

Speaking Information

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

Date	Sponsor	Topic
11/1/08	Soc. of FSP Forum	Mythologies of Risk in Ret Plng
10/6/08	FPA Forum (Boston)	" " "
9/5/07	FPA Forum (Seattle)	Guar Living Benefits in VAs
5/31/07	NAIFA (Arcadia, LA)	Tax Traps in Annuity Planning
9/24/07	CT Dept of Insurance	Annuity Suitability Issues
1/23/06	Soc of FSP Institute	Annuity Planning Issues

Do you have presentation references that local EPCs can contact (list name, organization and phone number)? Sherry Chester (Soc of FSP) - 610-526-2510; Diane McAfee (FPA) 800-322-4237 x 7117; Clmt Pogemiller (Modern Woodmen) 309-558-3113; Michael Reed (SFSP-Cent IL) 309-682-9383

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List locations of the estate planning councils to whom you have talked in the last three years: St. Louis, MO; Est Pl. Council of Eastern CT

On average, how many times a year to you speak (to groups outside your own firm): 8
____ within a fifty mile radius of your office ~ X more than fifty miles from your office

Have you written any (list the number): >10 articles 1 books

In what publications have you been quoted in the last five years (not as an author): Investment News; WSJ; Investment Advisor, Financial Planning, Forbes, Boomer, others

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

What requirements do you have for speaking?
X LCD projector X lavaliere microphone X overhead projector
____ flip chart ____ Other (list): ____

Do you charge for speaking (over your coach-class travel, lodging and meal costs)? Yes X No ____
If yes, what is the range of fees? $1,000 $3,000 (typical = $2,000)
List any other cost requirements (e.g., first class air): ____

Please provide information on your unique talents & background for speaking:
I aim to present information in a PRACTICAL context and an ENTERTAINING fashion. My evaluations are consistently excellent + I'm often invited to return because attendees ask for my return. Most of my presentations are customized for the individual group. I'm often "controversial" and never "dull".

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

- X International Taxes
- Other Tax Issues: Annuity Planning (Tax) Product Suitability How Products Work (annuities + life ins.)

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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: ___
- 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

- ___ Testamentary Trusts
- ___ Revocable Trusts
- ___ Lifetime Irrevocable Trusts
- ___ Life Insurance Trusts
- ___ Defective Trusts
- ___ Dynasty Trusts
- ___ S Corporation Trusts
- ___ 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
- X Other: Trusts & Annuities

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:

- Mythologies of Risk in Retirement Income Planning
- Tax Traps in Annuity Planning
- ~~Guaranteed~~ Guaranteed Living Benefits: Are they Worth It?
- Secondary Guarantees in Universal Life Planning: The Traps You Haven't Been Told About
- Index Annuities: How + When They Work... Or Don't Work
- Variable Universal Life: The Good, The Bad + The Ugly