



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: DONALD O. JANSEN Date Submitted: 8-30-2008

Professional Designations (check all that apply):

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

Member of the following estate planning council(s): CENTRAL TEXAS ESTATE PLANNING COUNCIL

Firm Name: UNIVERSITY OF TEXAS SYSTEM (OFFICE OF GENERAL COUNSEL)

Address: 1301 MCKINNEY SUITE 5700, HOUSTON, TX 77010

Work Phone: 512-499-4493 Fax:

Email: DJANSEN@FULBRIGHT.COM Website: WWW.DONALDJANSEN.COM

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

Speaking Information

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

Date	Sponsor	Topic
<u>1-16-2007</u>	<u>HECKERLING INSTITUTE</u>	<u>CLOSELY HELD COMPANY DEFERRED COMP. COMPENSATION AND LIFE INSURANCE</u>
<u>5-1-2007</u>	<u>AALU</u>	<u>UPDATE ON 409A REGULATIONS</u>
<u>6-30-2007</u>	<u>ACTEC</u>	<u>LIFE INSURANCE PREMIUM FINANCING</u>
<u>9-22-2006</u>	<u>SOUTHERN FEDERAL TAX INST.</u>	<u>DISCOUNT SPLIT DOLLAR</u>
<u>8-11-2008</u>	<u>LIMRA</u>	

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:

CENTRAL TEXAS (AUSTIN); SOUTHERN ARIZONA (TUCSON); CENTRAL ARIZONA (PHOENIX); RED RIVER VALLEY (FARGO)

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

2 within a fifty mile radius of your office ~ 11 more than fifty miles from your office

Have you written any (list the number): 13 articles 1 books

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

NATIONAL UNDERWRITER (LIFE & HEALTH);

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? \$3,500 - \$4,000

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, §29 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 checked="" type="checkbox"/> Life Insurance Trusts | <input type="checkbox"/> Choosing Fiduciaries |
| <input checked="" type="checkbox"/> Defective Trusts | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Dynasty Trusts | _____ |
| <input 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: NONQUALIFIED DEFERRED COMP.

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:

MOM AND POP WANT TO CUT HOURS BUT NOT PAY - DEFERRED COMP
ILIT PREMIUM FINANCING AND SPLIT DOLLAR
409A REGULATIONS -- 10 ITEMS ESTATE PLANNER SHOULD KNOW
GIVING BIRTH TO, CARING FOR, AND FEEDING ILIT
LIFE INSURANCE AND COMPENSATION
LIFE INSURANCE AND CHARITIES -- BASICS, ADVANCED AND OVER THE EDGE
INTERGENERATIONAL SPLIT DOLLAR