



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: _____ Date Submitted: _____

Professional Designations (check all that apply):

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

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

Firm Name: _____

Address: _____

Work Phone: _____ Fax: _____

Email: _____ Website: _____

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

Speaking Information

Please list your 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)? _____



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

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

On average, how many times a year do 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 ___ 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? _____

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:



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

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 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: _____



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

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:



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

Requirements

To be listed in the NAEPC Speakers Bureau, you must agree not to promote any product or service. In addition, you must be a Distinguished Accredited Estate Planner (an award given by the NAEPC) *or* have spoken at least two times in the previous two calendar years and have worked as a professional for at least ten years.

_____ I am a Distinguished Accredited Estate Planner *or*

_____ I have spoken at least two times in the previous two calendar years (please list speeches above)

_____ I have worked as a professional for at least ten years (please attach a short biography)

Attachments

Please attach written recommendations from:

- two affiliated local estate planning councils to whom have spoken in the previous two calendar years; or
- an approved national organization or event (e.g., Society of FSP, FPA, MDRT, ABA, AICPA, University of Miami Heckerling Institute on Estate Planning) to whose national meeting or annual event you have spoken to in the previous two calendar years; or
- confirmation of an approval rating of 85% or better in three estate planning or tax presentations made in the previous three calendar years in which least fifteen participants responded (please attach all the written reports).

If there is a reason you believe these requirements should be waived for you, please attach a separate letter to the NAEPC's Professional Development & Education Committee explaining why you feel an exception should be granted.

The undersigned speaker certifies that the foregoing information is correct and agrees to update such information when requested and no more than once per year. I agree not to promote any product or service when I make any presentation to an affiliated local estate planning council. I understand that submitting this information does not guarantee my being listed on the National Association of Estate Planners and Councils ("NAEPC") website and NAEPC may (in its sole and exclusive judgment), with or without cause, at any time not use or remove my name as a speaker or modify my listing. I agree to hold harmless and indemnify NAEPC, its affiliates, officers, directors, agents and employees from any claim, demand, expense or liability which may relate to or result from any presentation for which I have been engaged or the inaccuracy of any information contained herein.

Signature

Printed Name of Applicant