National Association of Estate Planners & Councils
1120 Chester Ave., Ste. 470
Cleveland, OH 44114

The Association of Choice for Estate Planning Professionals

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We are grateful for the support of the 56th Annual Advanced Estate Planning Strategies Conference Sponsors, including:

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Now with More Social & Networking Time and Single Day Passes

Now with More Social & Networking Time and Single Day Passes

56th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders

EDUCATION • COLLABORATION

November 5-8, 2019
The Cosmopolitan of Las Vegas
Las Vegas, Nevada

Brought to you by the National Association of Estate Planners & Councils

56th Annual Advanced Estate Planning Strategies Conference General Information

Registration Fees

Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders

	Early	Regular	Late
Member	$1175	$1225	$1275

Advanced Estate Planning Strategies Conference

	Early	Regular	Late
Member	$1045	$1095	$1145
Non-Member	$1270	$1320	$1370

Single Day Passes

	Early	Regular	Late
Tuesday	$200	$250	$300
Wednesday or Thursday			
Member	$445	$495	$545
Non-Member	$520	$570	$620
Friday			
Member	$275	$325	$375
Non-Member	$325	$375	$425

Early pricing applies to registrations received on or before September 30, 2019.
Late pricing applies to registrations received after October 18, 2019.

A member is defined as an Accredited Estate Planner® designee, Estate Planning Law Specialist certificant, At-Large Member of NAEPC, or leader of an affiliated local estate planning council. The member rate is also available to members of affiliated local estate planning councils.

NAEPC
1120 Chester Ave., Ste. 470 – Cleveland, OH 44114
866-226-2224 – www.naepc.org/conference

HOW TO REGISTER

Register at www.naepc.org/conference or contact the NAEPC office for a copy of the conference registration form.

Discounts

Active AEP® or EPLS	$50
Nevada Council Member	$50
NAEPC Volunteer	$100

Cancellation

A full refund will be granted for cancellations emailed to conference@naepc.org on or before 09/13/19. Registrants who cancel between 09/14/19 and 10/18/19 will forfeit a $100 administrative fee. No refunds will be granted after 10/18/19.

Headquarters Hotel & Lodging

NAEPC is delighted to host its 56th Annual Conference at The Cosmopolitan of Las Vegas in Las Vegas, Nevada. The NAEPC room rate is $219 plus a $25 resort fee (single/double occupancy, exclusive of applicable state and local taxes). Reservations must be made by 10/11/19 and can be made by calling 855-435-0005 and referencing group code "SNAEP9" or at www.NAEPC.org/conference.

Continuing Education Credit

Continuing education credit will be available nationwide for estate planning-related disciplines to those who attend the Wednesday, Thursday, and Friday technical education sessions (pending approval). **Life insurance professionals must attend all technical education sessions on Wednesday, Thursday, and Friday to receive credit; partial credit is not available, nor is insurance credit for single day attendance.**

For complete details and approval status, visit www.naepc.org/conference.

Pre-Conference Sessions for Council Leaders & Executives

Tuesday, November 5, 2019 – Schedule of Events

7:00 am – 8:00 am	Breakfast (**Leader** / **Executive** Track)
8:00 am – 8:40 am	Learning Pod #1 (**Leader** / **Executive** Track)
8:50 am – 9:30 am	Learning Pod #2 (**Leader** Track)
8:50 am – 10:30 am	Executive Session with Webmaster (**Executive** Track)
9:30 am – 9:50 am	Conversation Break
9:50 am – 10:30 am	Learning Pod #3 (**Leader** Track)
10:30 am – 10:45 am	Conversation Break
10:45 am – 12:20 pm	Annual Meeting & Awards Luncheon (**Leader** / **Executive** Track)
12:30 pm – 1:30 pm	Learning Pod #4 (**Leader** / **Executive** Track)
1:40 pm – 2:30 pm	Learning Pod #5 (**Leader** / **Executive** Track)
2:30 pm – 2:45 pm	Conversation Break
2:45 pm – 3:45 pm	Council by Size Sharing Session (**Leader** / **Executive** Track)
3:45 pm – 4:00 pm	Conversation Break
4:00 pm – 5:00 pm	Council by Size Sharing Session Resumes (**Leader** / **Executive** Track)
5:00 pm – 6:00 pm	Opening Reception with Exhibitors for All Attendees & Registered Companions
6:00 pm	Private Council Executive Dinner (**Executive** Track)

Council Leadership Day is a learning and sharing experience for volunteer leaders and staff of councils from across the country. The day provides separate tracks for leaders and executives (paid staff) and offers two-way conversations and time to speak to other leaders, along with focused "Learning Pods," sessions that address hot topics and new ideas.

Crafting Exciting Events with Broad Appeal

Negotiating with Venues, Vendors & Service Providers

Best Practices in Welcoming New Members

Creating a Member Milestone Program and Service/Achievement Awards

Becoming a Council of Excellence

Creating a Sponsorship Program / Increasing Non-Dues Revenue

NAEPC Benefits and Resources Review

Operations Checklist

Usage of the Accredited Estate Planner® Designation Council Nomination Program

Staffing Your Council: Employing an Association Executive

Dipping a Toe into Social Media, What's Right for Your Council?

Making the Most of your Council's NAEPC-Hosted Website

NAEPC-Hosted Website Platform: About Us to Contact Us

Leading across Generations: Shifting from a Change to an Evolution Mindset

Potpourri of Concepts and New Ideas: Council Operations

Potpourri of Concepts and New Ideas: Visions of Tomorrow

Visit Our Website

Visit www.naepc.org/conference for a detailed description of each Learning Pod.

Sessions for executives continue through noon on Wednesday, November 6, 2019 - please make travel plans accordingly. Council executives are always eligible to attend the conference with the registration fee waived.

56th Annual Advanced Estate Planning Strategies Conference Schedule of Events

Tuesday, November 5, 2019

4:45 pm - 5:15 pm
Companion Registrant Meet & Greet

5:00 pm - 6:00 pm
Opening Reception with Exhibitors for All Conference Attendees and Registered Companions

Wednesday, November 6, 2019

5:45 am
2-Mile Fun Run & Walk (all fitness levels welcome, pre-registration requested)

6:30 am - 8:00 am
Breakfast with Exhibitors

7:00 am - 7:45 am
Concurrent Sponsor Bonus Sessions

Small Business Gifts to CRTs and DAFs
Gregory W. Baker, JD, ChFC®, CFP®, CAP®
provided by RenPSG

Timeshares and Estate Planning
Chuck McDowell
provided by Wesley Financial Group, LLC

8:00 am - 8:30 am
Welcome & Opening Remarks

8:30 am - 9:30 am
Estate Planning Tips and Nuggets
Martin M. Shenkman, CPA/PFS, MBA, JD, AEP® (Distinguished)
Shenkman Law

Companion Program & Tours

Companion registration options are offered as an accompaniment to the annual conference for those who will be attending with a registrant, but will not be taking advantage of the educational sessions.

Tour Package **$475**
Includes the conference receptions and breakfasts, the outings, and the friendship!

Meal-Only Package **$300**
Reception Tickets **$75/reception**

Wednesday November 6, 2019
Animal Lovers Tour
10:00 am - 3:00 pm

Thursday November 7, 2019
Red Rock Canyon Tour
8:00 am - 12:00 pm


Visit www.naepc.org/conference for a detailed description of each tour.

8:00 am - 12:00 pm
Council Executive Development Session
(Executive Track)

9:30 am - 10:30 am
Life Settlement Legal and Ethical Responsibility
Jamie L. Mendelsohn, Jason T. Mendelsohn, & Jon B. Mendelsohn
provided by Ashar Group, LLC

10:30 am - 11:00 am
Break with Exhibitors

11:00 am - 12:00 pm
Traps for the Unwary – Some Estate Planners' Proscriptions and Conundrums
Richard A. Oshins, JD, LL.M., MBA, AEP® (Distinguished)
Oshins & Associates, LLC

Jeffrey Schoenblum, JD, AEP® (Distinguished)
Vanderbilt University Law School

12:00 pm - 1:30 pm
Lunch with Exhibitors

1:30 pm - 2:30 pm
Ethics of Negotiation
Michael H. Rubin, JD
McGlinchey Stafford

2:30 pm - 3:30 pm
Financial Issues for the Recent Widow or Widower
Jeremiah W. Doyle, IV, JD, LL.M. (taxation), LL.M. (banking law), AEP® (Distinguished)
BNY Mellon Wealth Management

3:30 pm - 4:00 pm
Break with Exhibitors

4:00 pm - 5:00 pm
Valuation: How to Read and Critique an Appraiser's Appraisal
Stephanie Loomis-Price, JD, AEP® (Distinguished)
Winstead PC

5:00 pm - 6:30 pm
Reception with Exhibitors for All Conference Attendees and Registered Companions

Recognizing Excellence in Estate Planning & Service to the Profession

2019 Estate Planning Hall of Fame® Entrants
Jay D. Adkisson, JD
Dirk Edwards, CPA/PFS, JD, MBA
Neil E. Harl, Ph.D., JD
Beth Shapiro Kaufman, JD
Kathleen B. Leipprandt, CLU®, ChFC ®, CFP®
Mary F. Radford, JD
Julie Welch, CPA/PFS, CFP®

2019 Hartman Axley Lifetime Service Award Recipient
Jeffrey N. Pennell, JD, AEP® (Distinguished)

Join us for the recognition ceremonies on
Thursday, November 7, 2019


Thursday, November 7, 2019

6:30 am - 7:45 am
Breakfast with Exhibitors

7:00 am - 7:45 am
Sponsor Bonus Session

Fiduciary Oil & Gas Management Risk Mitigation
Wes Turiano
provided by Farmers National Company

7:50 am - 8:15 am
Opening Remarks

8:15 am - 8:30 am
Presentation of Hartman Axley Lifetime Service Award

8:30 am - 9:30 am
Income Tax Aspects of Trusts and Estates
Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)
Georgia State University College of Law

9:30 am - 10:00 am
Estate Planning Hall of Fame® Induction Ceremony

10:00 am - 10:30 am
Break with Exhibitors

10:30 am - 11:30 am
Beyond the Numbers: Understanding Forms 1041 / 706 / 709
Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA
Keebler & Associates, LLP

11:30 am - 12:30 pm
Impact of the Tax Cuts and Jobs Act on Life Insurance Planning
Lee J. Slavutin, MD, CLU®, AEP® (Distinguished)
Stern Slavutin - 2, Inc.

12:30 pm - 1:30 pm
Lunch with Exhibitors

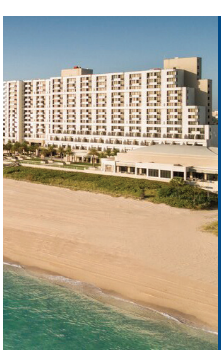
1:35 pm - 2:35 pm
Concurrent Breakout Sessions

Traps for the Unwary – Some Estate Planners' Proscriptions and Conundrums, a Deeper Dive
Richard A. Oshins, JD, LL.M., MBA, AEP® (Distinguished)
Oshins & Associates, LLC

Jeffrey Schoenblum, JD, AEP® (Distinguished)
Vanderbilt University Law School

Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy
Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®
BNY Mellon

Minority Report: Planning for Clients with Minor Children
Sarah Moore Johnson, JD
Birchstone Moore LLC



57th Annual NAEPC Advanced Estate Planning Strategies Conference

November 3 - 6, 2020
Ft. Lauderdale, Florida
Marriott Harbor Beach Resort & Spa

2:35 pm - 3:05 pm
Break with Exhibitors

3:05 pm - 4:05 pm
Concurrent Breakout Sessions

New Kids on the Block(chain): Planning with Bitcoin and Cryptocurrency
Abigail Earthman, JD, LL.M.
Winstead PC

Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy
Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®
BNY Mellon

Preparing the Next Generation for What's Ahead
Donna E. Trammell
Bessemer Trust

4:15 pm - 5:15 pm
Private Session for Accredited Estate Planner® Designees and Estate Planning Law Specialist Certificants: Lessons from Empty Mansions, a Mystery of Wealth and Loss with Bill Dedman, Pulitzer Prize Winning Journalist
Though the reclusive heiress Huguette Clark owned palatial homes in California, Connecticut, and New York, she lived for twenty years in a simple hospital room. Bill Dedman will recount the mistakes of the Clark family told through the eyes of daughter Huguette, who as a young girl held a ticket on the Titanic and as an elderly woman was still living in New York City on 9/11.

Friday, November 8, 2019

7:30 am - 8:30 am
Breakfast & Supplemental Concurrent Breakfast Sessions

Accredited Estate Planner® Designation from A - Z
For those interested in learning more about the AEP® designation, this session offers the perfect opportunity to have your questions answered by the experts at NAEPC.

Getting Started on the Path to Specialization with the Estate Planning Law Specialist Certification
This session is for actively-licensed attorneys who are interested in learning more about the EPLS certification, the only national board certification in estate planning.

8:30 am - 8:45 am
Opening Remarks and BINGO Drawing

8:45 am - 9:50 am
Estate Planning and Trust Management for a Brave New World: It's all in the Family… What's a Family?
R. Hugh Magill, JD, AEP® (Distinguished)
Northern Trust Corporation

9:50 am - 10:55 am
Charitable Giving with Retirement Assets: Strategies, Traps and Solutions
Christopher R. Hoyt, JD, AEP® (Distinguished)
University of Missouri - Kansas City School of Law

10:55 am - 11:10 am
Grab & Go Break

11:10 am - 12:10 pm
Powers of Appointment: Basics, Basis, and Beyond
Turney P. Berry, JD, AEP® (Distinguished)
Wyatt, Tarrant & Combs LLP

12:10 pm - 12:15 pm
Closing Remarks