National Association of Estate Planners & Councils
& The NAEPC *Foundation*

44TH ANNUAL CONFERENCE

NOVEMBER 14-
NOVEMBER 16

2007

NEW ORLEANS, LA

Co-hosted by

The New Orleans Estate Planning Council

FIRST NAME

LAST NAME

NICKNAME FOR NAMETAG PURPOSES

COMPANY

PROFESSIONAL DESIGNATIONS

STREET ADDRESS

CITY, STATE, ZIP

PHONE

FAX

E-MAIL ADDRESS FOR REGISTRANT

AFFILIATED LOCAL ESTATE PLANNING COUNCIL

❑ I have read and understand the continuing education credit and refund policies.

Registration must be received by October 31, 2007 to be included in the roster of attendees and to avoid the $50 late fee.

COMPANION FULL NAME & NICKNAME

COMPANION STREET ADDRESS

COMPANION CITY, STATE & ZIP

COMPANION PHONE

COMPANION E-MAIL

Mail registration and check to:
National Association of Estate Planners & Councils
1120 Chester Ave., Suite 470
Cleveland, OH 44114-3514

Or register online at www.naepc.org
Or fax registration with credit card information to: 216-696-2582

❑ VISA
❑ MasterCard
❑ American Express

ACCOUNT NUMBER EXP. DATE

SIGNATURE DATE

Please check all that apply.

❑ Affiliated Local Council Administrator (no charge)
❑ Affiliated Local Council Board Member
❑ Affiliated Local Council Member
❑ NAEPC Member At-Large
❑ NAEPC Past President

EARLY REGISTRATION DISCOUNT

Early rate applies for Council Leadership Day or Educational Package registrations ***received*** prior to September 14, 2007. (See fee computation below.)

	Member	Non-member
Council Leadership Day Package	$700	$750
Conference Educational Package	$600	$650
3-day Companion Registration Package		$275
2-day Companion Registration Package		$225

Council Leadership Day Package — Includes Council Leadership Day sessions, technical education sessions, presentation material, conference breakfasts & luncheons, the Wednesday evening Welcome Reception & the Thursday Social Event.

Conference Educational Package — Includes the Wednesday evening Welcome Reception, technical education sessions, presentation material, conference breakfasts & luncheons & the Thursday Social Event.

3-day Companion Registration Package — Includes conference breakfasts, the Wednesday-Friday companion tours, the Wednesday evening Welcome Reception & the Thursday evening Social Event.

2-day Companion Registration Package — Includes conference breakfasts, the Thursday-Friday companion tours, the Wednesday evening Welcome Reception & the Thursday evening Social Event.

****A $50 Late Fee will be applied to ALL registrations postmarked on or after October 31, 2007.***

❑ I am a ***Council Leadership Day Package*** Registrant
- ❑ I will attend the Welcome Reception on Wed., November 14, 2007
- ❑ I will attend the Social Event on Thur., November 15, 2007
- ❑ I have chosen technical education breakout sessions from the shaded box below
- ❑ I will attend the Habitat for Humanity volunteer event on Sat., November 17, 2007 # of additional volunteers ______

❑ I am a ***Conference Educational Package*** Registrant
- ❑ I will attend the Welcome Reception on Wed., November 14, 2007
- ❑ I will attend the Social Event on Thur., November 15, 2007
- ❑ I have chosen technical education breakout sessions from the shaded box below
- ❑ I will attend the Habitat for Humanity volunteer event on Sat., November 17, 2007 # of additional volunteers ______

❑ I am a ***3-day Companion*** Registrant
- ❑ I will attend the Companion Tour on Wednesday, November 14, 2007
- ❑ I will attend the Welcome Reception on Wednesday, November 14, 2007
- ❑ I will attend the Companion Tour on Thursday, November 15, 2007
- ❑ I will attend the Social Event on Thursday, November 15, 2007
- ❑ I will attend the Companion Tour on Friday, November 16, 2007

❑ I am a ***2-day Companion*** Registrant
- ❑ I will attend the Welcome Reception on Wednesday, November 14, 2007
- ❑ I will attend the Companion Tour on Thursday, November 15, 2007
- ❑ I will attend the Social Event on Thursday, November 15, 2007
- ❑ I will attend the Companion Tour on Friday, November 16, 2007

Fee Computation

Primary Registrant Fee	_______
Less $50 discount (if postmarked by September 14, 2007)	_______
Companion Registrant Fee	_______
Late Fee ($50 if postmarked later than 10/31/07)	_______
TOTAL ENCLOSED	_______

Technical Education Breakout Session Choices

Thursday, November 15, 2007

______ *Life Settlements: Lies, Damn Lies and Outstanding Planning Opportunities*
Harry M. Beck, CLU, CFA, CFP®

______ *GRATS vs. Installment Sales vs. Straight Gifts*
Jonathan G. Blattmachr, JD, AEP

______ *Planning for Non-Traditional and Blended Families*
Regina O. Matthews, JD

PROGRAM

FRIDAY, NOVEMBER 16, 2007

7:00 am-8:00 am
Breakfast

8:00 am-8:30 am
Recognition of 2007 Distinguished Accredited Estate Planners
Presentation of 2007 Hartman Axley Lifetime Service Award

8:30 am-10:00 am
"Estate Planning for Middle Class Clients"
Jonathan G. Blattmachr, JD, AEP

10:00 am-10:30 am
Break

10:30 am-12:00 noon
"The Ethical Edge"
Richard M. Weber, MBA, CLU

12:00 noon-1:00 pm
Lunch

1:00 pm-2:30 pm
"Planned Giving Strategies"
Jerry J. McCoy, LL.B., LL.M.

2:30 pm-3:00 pm
Break

3:00 pm-3:45 pm
"Working More Effectively for Widows"
Alexandra Armstrong, CFP®, CMFC

3:45 pm-5:00 pm
"Estate and Gift Tax Audits – Drafting and Practical Suggestions for Ultimate Success"
Louis A. Mezzullo, JD

SATURDAY, NOVEMBER 17, 2007

6:30 am-3:00 pm
Habitat For Humanity® Volunteer Experience

SPEAKERS

LOUIS A. MEZZULLO, JD
Louis A. Mezzullo is a partner in the law firm of Luce, Forward, Hamilton & Scripps LLP, working principally out of its Rancho Santa Fe, CA office. His principal areas of practice are taxation, estate and business succession planning and employee benefits. He is on the faculty of the University of Miami School of Law Graduate Program in Estate Planning. He also lectures for the CLE Committee of the Virginia Bar Foundation and the Virginia Society of CPAs. He was an adjunct professor of law at the University of Richmond Law School from 1978 until 2006. He is listed in *Who's Who in American Law*, *Who's Who in Emerging Leaders* and *Who's Who in America* (Marquis Who's Who Publishers) and in *The Best Lawyers in America* (for Tax, Employee Benefits and Trusts and Estates)(Woodward/White Publishers).

JEFFREY N. PENNELL
Jeffrey N. Pennell is the Richard H. Clark Professor of Law at Emory University School of Law in Atlanta, GA. A graduate of Northwestern University School of Law, he is a member of the American Law Institute, an Adviser for its Restatement of the Law (Third) of Property - Wills and Other Donative Transfers, an Associate Reporter for its Restatement of the Law (Third) of Trusts, a former member of the Council of the Real Property, Probate & Trust Law Section of the American Bar Association, an Academic Fellow and Former Regent of ACTEC, and an Academician of The International Academy of Estate and Trust Law. His various publications include *Income Taxation of Trusts, Estates, Grantors and Beneficiaries* (West 1987), *Federal Wealth Transfer Taxation* (West 2003), *Wealth Transfer Planning and Drafting* (West 2005), *Estate and Trust Planning* (ABA 2005), the *Tax Management Portfolios on Estate Tax Apportionment* (BNA 2001) and on the *Marital Deduction* (BNA 2004), and he is the successor author of *Casner & Pennell on Estate Planning* (6th ed.).

WINTON C. SMITH, JR., JD
Winton C. Smith, Jr. is a practicing attorney who specializes in estate tax strategies and tax planning, financial development and planned giving for charitable organizations. His background includes 25 years of practical experience in structuring and marketing major gifts. He represents both individual philanthropists and charitable institutions, keeping them informed of the latest tax law changes affecting charitable gifts. Mr. Smith's ability to present the many complex subjects involved in charitable giving in an easy-to-understand manner sets him apart from other lecturers. He conducts the Council for the Advancement and Support of Education (CASE) Planned Giving Institute in various cities across the country each year and is the only CASE presenter to consistently receive top ratings for his delivery of the course, "Introduction to Planned Giving." Mr. Smith has been a frequent speaker at programs sponsored by the National Council on Planned Giving (NCPG), Association of Fundraising Professionals (AFP) and the Association for Healthcare Philanthropy (AHP). He regularly presents charitable tax strategy seminars and workshops for bar associations, estate planning councils, colleges, universities, law schools and hospitals, as well as natural resources and conservation, religious, social welfare and other charitable organizations.

JOHN A. WARNICK, JD
John A. Warnick is a senior partner in the Denver office of Holme Roberts & Owen LLP, a firm of 250 lawyers with offices in Denver, Los Angeles, San Francisco, Salt Lake City, Boulder, Colorado Springs, London and Munich and chairs the firm's Individuals, Trusts and Family Business practice group. Mr. Warnick is a Fellow of ACTEC, a member of AFHE (Attorneys for Family Held Enterprises) and Advisors in Philanthropy. He also serves as a member of the advisory board of the Family Building Institute, on the Board of Elders of the Copper Beech Tree Society and as an advisor to a 501(c)3 organization which is seeking to become a "global community foundation." Mr. Warnick has written and spoken extensively across the nation. He was the author of two BNA Tax Management portfolios. He co-authored *Selecting a Trust Situs in the 21st Century* which was published in the March/April 2002 issue of *Probate and Property*. He is currently serving as co-editor of a book on best practices for trusts and large gifts and is also working on two other books entitled *The Generative Trust, Trustee and Trust Advisor* and the *New Vocabulary of Family Wealth* which he hopes to complete in 2008. Mr. Warnick received a BA, magna cum laude, from Brigham Young University and his JD from George Washington University.

RICHARD M. WEBER, MBA, CLU
Richard M. Weber is known as one of the life insurance industry's leaders for his work in insurance company and product Due Care. A successful life insurance salesman for 25 year and 20 year life member of the Million Dollar Round Table, he joined Merrill Lynch Insurance Group and from late 1993 to the end of 1995 served as Vice President and Manager of Client Education and Field Development. Since that time, Mr. Weber founded and is President of The Ethical Edge, Inc., providing training and consulting services that help empower both agents and their clients to explore and view life insurance in the broader context of financial planning. During this same period, he was a co-developer of *Dynamic Insurance Solutions* and *Historic Variability Module*, computer based tools that have begun to revolutionize the way advisors and their clients view life insurance products. Mr. Weber served for 11 years as an Instructor of Insurance at the University of California at Berkeley's Program in Personal Financial Planning and from 1993 through 1998 served as Adjunct Professor of Ethics at The American College in Bryn Mawr, PA. His monthly Due Care column for Life Insurance Selling (1990 - 2001) was one of the few agent-focused tutorials for ethical selling during the industry's most turbulent decade. Mr. Weber is also a contributing author to *Managing Sales Professionals*, a text for management training published by The American College. Other periodicals in which Dick's writings have appeared include *Probe, The Society Page, The Journal of Financial Service Professionals, Trusts & Estates, Estate Planning Magazine, and Best's Review*. He is also the author of a self-published book for life insurance professionals: *The Ethical Edge: How to Compete with Your Integrity Intact (and Still Get the Sale!)* and his newest book, *Revealing Life Insurance Secrets: How the Pros Pick, Design, and Evaluate Their Own Policies*, is directed at advisors and financial service professionals. Mr. Weber holds an MBA from the University of California at Berkeley with a specialty in Insurance and Finance.

COMPANION PROGRAM

Companion Registrant Information *– Companion Conference Registration Fee includes all breakfasts, Wednesday evening Welcome Reception, the companion tours and the Thursday evening Social Event. Educational sessions are not available to companions.*

WEDNESDAY, NOVEMBER 14, 2007

SWAMP & BAYOU TOUR

10:30 am - 3:30 pm

After a short motorcoach ride across the Mississippi River, attendees will take a fascinating boat trip into the Louisiana swamps & bayous to experience the timeless beauty of South Louisiana in a custom built, all weather swamp boat. Native guides will reveal the mysteries of the swamps and bayous and the Cajun "joie de vivre". Hear how the Cajuns turned soup into gumbo, the washboard into a musical instrument and the swamps of Louisiana into a paradise. The group will observe the nesting grounds of alligators, egrets, raccoons, nutria, and many species of snakes and will be treated to a Bayou Nature Wildlife Show by a local naturalist. Snakes, alligators, snapping turtles, raccoons and nutria will be among the invited animal guests. In addition, the tour will teach attendees about the efforts made to preserve and restore Louisiana's vanishing wetlands. Please bring a camera to capture the "bon temps" (good times) on the bayou! Snacks and refreshments are available on the boat.

THURSDAY, NOVEMBER 15, 2007

FUN, FOOD & FOLKLORE...AND THE NEW ORLEANS SCHOOL OF COOKING!

9:30 am - 1:00 pm

Since 1980, the New Orleans School of Cooking has introduced countless visitors from around the world to the wonderful food and rich culture of Louisiana and New Orleans. Attendees will experience entertaining cooking classes located in a renovated molasses warehouse built in the early 1800s in the heart of the French Quarter. They will learn the basics of Louisiana cooking in a never to be forgotten way. (Fun is a primary ingredient in this recipe!) The school's Creole/Cajun experts teach New Orleans specialties such as Gumbo, Jambalaya and Pralines, and season them with history, trivia and tall tales. It's a "garon-teed" good time for all.

The group will leave the Astor Crowne Plaza hotel at 9:30 am and walk to the nearby New Orleans School of Cooking. The class will end with lunch and attendees can plan to be back at the hotel no later than 1:00 pm. Of course, those that are interested are welcome to explore the nearby shops, restaurants and attractions at

FRIDAY, NOVEMBER 16, 2007

NEW ORLEANS DISASTER & RECOVERY TOUR FOLLOWED BY SHOPPING ON ROYAL STREET

9:00 am - 12:00 noon

Join us for an eyewitness account of the events surrounding the most devastating natural, and man-made, disaster on American soil! Learn the history of the original city, the French Quarter, and why it was built at this particular location along the Mississippi River. The tour will drive past an actual levee that "breached" and see the resulting devastation that displaced hundreds of thousands of U.S. residents. The tour guide will give a local's chronology of events leading up to Hurricane Katrina and the days immediately following the disaster. This tour will travel through neighborhoods such as Lakeview, Gentilly, New Orleans East and the Ninth Ward and will also ride past the colorful "Musicians' Village" homes being constructed by Habitat for Humanity® in the upper Ninth Ward. After this tour, you'll have a better understanding of events pre and post Katrina and the "Rebirth of New Orleans!"

At the conclusion of the tour, paticipants are encouraged to explore the many shops on Royal Street.

Thursday evening Social Event – Dinner & Self-Guided Tour of The Presbytere

THURSDAY, NOVEMBER 15, 2007 – 6:30 pm - 9:00 pm

The Presbytere, originally called the Casa Curial (Ecclesiastical House), derives its name from the fact that it was built on the site of the residence, or presbytere, of the Capuchin monks. It was designed in 1791 to match the Cabildo, or Town Hall, on the other side of St. Louis Cathedral. As with the Cabildo and the Cathedral, construction was financed by philanthropist Don Andres Almonester y Roxas. The second floor, however, was not completed until 1813, when the Wardens of the Cathedral assumed responsibility for the final phase. The building initially was used for commercial purposes until 1834 when it became a courthouse. In 1847 the structure's mansard roof was added. The Presbytere became a part of the Louisiana State Museum in 1911. The property now houses Mardi Gras memorabilia.

At this event you will experience the fantasy, fun and fascination of Louisiana's famous tradition. Mardi Gras: Carnival Time in Louisiana captures the essence of this event through rare artifacts, elaborate displays and imaginative technology.

COUNCIL LEADERSHIP DAY PROGRAM

WEDNESDAY, NOVEMBER 14, 2007

Council Leadership Day is designed to be a sharing session among leaders of NAEPC Affiliated Local Councils. The morning is dedicated to the National Association of Estate Planners & Councils Annual Meeting while afternoon sessions will be committed to leadership development. The attendee can expect to interact with fellow volunteer leaders, attend breakout sessions designed for idea sharing & growth and learn about ongoing NAEPC programs and services. Over 40% of affiliated local councils are represented by officers and/or board members each year. Don't miss the opportunity to share your council's successes and learn how to overcome the struggles!

It is the NAEPC's belief that an important part of leadership development and knowledge lies within council staff. As such, Administrators (paid council staff) are encouraged to attend the Council Leadership Day activities at no charge.

COUNCIL LEADERSHIP DAY SCHEDULE*

8:00 am - 8:30 am
Breakfast

8:30 am - 10:15 am
NAEPC Annual Meeting

10:15 am - 10:45 am
Break

10:45 am - 12:00 noon
"Focus Group" Sessions with NAEPC leaders and staff

12:00 noon - 1:00 pm
Lunch

1:00 pm- 5:00 pm
Council Leadership Sharing Sessions
Concurrent Session for Administrators

5:00 pm - 7:00 pm
Welcome Reception for council leaders, administrators and educational attendees.

* *A detailed final schedule will be distributed to registered attendees via email prior to the event.*

CONTINUING EDUCATION CREDIT INFORMATION

To receive CE credit – guidelines require:
- being on time and staying through each session
- completing any necessary forms or paperwork

Continuing education credit will be requested for Thursday, November 15, 2007 and Friday, November 16, 2007.

Legal and insurance credit requests will be filed in Louisiana. The NAEPC will provide documentation to assist those in states other than Louisiana in applying for credit in their home state, but cannot guarantee acceptance of the course for credit. The NAEPC will file a credit request for the following disciplines or types of credit; CTFA, PACE and CFP®.

The NAEPC recommends a total of 12 credits for CPA's in Specialized Knowledge and Applications. The NAEPC's 44th Annual Conference is an advanced educational program and preparation is not required prior to attending. The National Association of Estate Planners & Councils is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE Credit. Complaints regarding registered sponsors may be addressed to the National Registry CPD Sponsors, 150 Fourth Avenue North, Ste. 700, Nashville, TN, 37219-2417. Website: www.nasba.org. For more information regarding administrative policies, such as complaint and refund, please contact the NAEPC office at (866) 226-2224.

PROGRAM

WEDNESDAY, NOVEMBER 14, 2007

5:00 pm-7:00 pm
Welcome Reception for all Attendees

THURSDAY, NOVEMBER 15, 2007

7:00 am-8:00 am
Breakfast

8:00 am-8:10 am
Welcome & Opening Remarks

8:10 am-9:50 am
"Charitable Remainder Trusts"
Winton C. Smith, Jr., JD

10:00 am-10:50 am
"Creative Uses of Life Insurance in Estate & Financial Planning"
Jonathan G. Blattmachr, JD, AEP

10:50 am-11:20 am
Break

11:20 am-12:20 pm
(Breakout Sessions, indicate choice on registration form)

"Life Settlements: Lies, Damn Lies and Outstanding Planning Opportunities"
Harry M. Beck, CLU, CFA, CFP®

"GRATS vs. Installment Sales vs. Straight Gifts"
Jonathan G. Blattmachr, JD, AEP

"Planning for Non-Traditional and Blended Families"
Regina O. Matthews, JD

12:20 pm-1:20 pm
Lunch

1:20 pm-3:00 pm
"Recent Developments in Estate Planning"
Jeffrey N. Pennell

3:00 pm-3:20 pm
Break

3:20 pm-5:00 pm
"Changing the Paradigm of Trusts & Family"
John A. Warnick, JD

6:30 pm-9:00 pm
Social Event at The Presbytere

SPEAKERS

ALEXANDRA ARMSTRONG, CFP®, CMFC
Alexandra Armstrong has worked in the investment field for over 30 years and was the first person certified as a financial planner in Washington, DC in 1977. Previously a Senior Vice President of a New York Stock Exchange firm, she is now Chairman of Armstrong, Fleming & Moore, Inc., a personal financial planning and asset management firm based in Washington, DC. Ms. Armstrong is past chairman of the International Association for Financial Planning (now FPA), and served on the Board of Visitors of Georgetown University School of Business Administration as well as the CFP Board of Standards and Financial Service Corporation. She writes a monthly column on financial planning for *Better Investing*, the magazine published by the National Association of Investment Clubs. Ms. Armstrong lectures nationally on financial planning and has been a guest on several national television shows including Wall $treet Week, CBS This Morning and Good Morning America. She has co-authored a book for widows called *On Your Own: A Widow's Passage to Emotional and Financial Well Being* (Fourth Edition 2006).

HARRY M. BECK, CLU, CFA, CFP®
Harry M. Beck is the Executive Vice President of Provada Insurance Services, a leading brokerage general agency and life settlement brokerage serving financial professionals. Previously he was a Managing Director of AdvisorCoach LLC, a consulting and coaching firm located in San Francisco, and was a principal of Presidio Wealth Management, the investment division of a specialty investment bank servicing ultra high-net worth clients. With over 25 years experience in the financial services industry, Mr. Beck has also held senior sales and marketing positions for the Prudential Investment Advisory Group, Phoenix Investment Partners, Seligman Marketing, Inc. and Oppenheimer Management Corporation. Mr. Beck is a member of NAIFA, FPA, Society of FSP, CFA Institute and The Security Analysts of San Francisco. He recently authored a white paper, *Inflection Points & The Future of Life Insurance*. His articles about life settlements have appeared in *California Broker, The Palm Beach Journal* and other publications. Harry M. Beck is a 1977 graduate of Syracuse University and is a Chartered Life Underwriter (CLU), a Certified Financial Planner® (CFP®), and a Chartered Financial Analyst (CFA).

JONATHAN G. BLATTMACHR, JD, AEP
Jonathan G. Blattmachr is a partner in the law firm of Milbank, Tweed, Hadley & McCloy, L.L.P. He has served as a lecturer-in-law at the Columbia University School of Law and an adjunct Professor of Law at New York University Law School. He is a former chairperson of the Trusts & Estates Law Section of the New York State Bar Association and of other committees of the New York and American Bar Associations. Mr. Blattmachr is a Fellow and former Regent of ACTEC and past chair of its Estate and Gift Tax Committee. He is author or co-author of over 250 articles and four books on estate planning topics. He was the Editor of *The Chase Review* during its entire 18-year publication history by The Chase Manhattan Bank. Mr. Blattmachr is also co-developer of Wealth Transfer Planning, a software system published for lawyers, which provides specific client advice and automated document sharing for wills, trusts, powers of attorney and other estate planning documents. Jonathan was named a Distinguished Accredited Estate Planner by the National Association of Estate Planners & Councils in 2004.

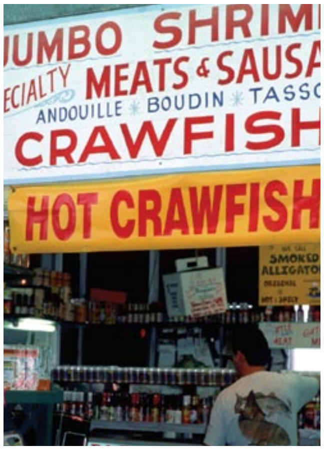
REGINA O. MATTHEWS, JD
Regina O. Matthews practices with the New Orleans, LA firm of Martzell & Bickford. In addition to her general civil litigation and health care law practices, she has developed an estate planning and probate practice with a special emphasis on the needs of non-traditional families. Ms. Matthews received her law degree, *magna cum laude*, from Tulane Law School, where she served as Senior Managing Editor of the Tulane Law Review and was inducted into the Order of the Coif. She also holds a Bachelor of Arts in English from Louisiana Polytechnic Institute (now Louisiana Tech University) and a Master of Science in Librarianship from Louisiana State University in Baton Rouge. Her numerous volunteer activities have included service on the Boards of Directors of the Louisiana Chapter of the American Civil Liberties Union, and AIDSLaw of Louisiana, Inc. (founding director), which honored her with its Pro Bono Publico award in January 1996. She has also been honored twice by the New Orleans Chapter of the Human Rights Campaign in recognition of community activism on behalf of the local GLBT community. Ms. Matthews has presented programs on estate planning at the New Orleans Estate Planning Council's "Estate Planning Day," the Louisiana Trial Lawyers Association's "Peoples Law School," and Tulane Law School's 1997 & 2004 Estate Planning Seminars and has also presented lectures on legal ethics and professionalism. She is a member of the Louisiana, New Orleans and American Bar Associations and of the New Orleans Estate Planning Council.

JERRY J. MCCOY, LL.B., LL.M.
Jerry J. McCoy is an independent attorney in Washington, DC, specializing in charitable tax planning, tax-exempt organizations and estate planning. He holds law degrees from Duke University and New York University. A member of the American Law Institute and a Fellow of both ACTEC and the American College of Tax Counsel, Mr. McCoy is listed in *Who's Who in America*, *Who's Who in American Law* and *The Best Lawyers in America*. A frequent presenter at planned giving, tax and estate planning seminars, he serves on the adjunct faculties of the Georgetown University Law Center and the University of Miami Law School. He is a former chairman of the Charitable Planning and Exempt Organizations Committee of ACTEC, and Group Chair of the Charitable and Exempt Organizations Group of the ABA Section of Real Property, Probate and Trust Law. Mr. McCoy is co-founder and co-editor of two newsletters, *Charitable Gift Planning News* and *Family Foundation Advisor*. He is co-author of *The Family Foundation Handbook* (2nd Edition), published by CCH (2006).

GENERAL INFORMATION

NEW ORLEANS, LOUISIANA GENERAL INFO

The most celebrated and historic core of the city - including the Faubourg Marigny, French Quarter, Central Business District, Warehouse and Arts District, Magazine Street, Garden District, Audubon Park and Zoo and St. Charles Avenue - not only remains intact, both physically and spiritually, but is thriving. The cultural riches, sensual indulgences and unparalleled service that define the New Orleans experience continue to flourish, as they have for centuries. The city is open, fully prepared and eager to welcome all of its visitors again.



The historic and cultural experience that attracts more than 10 million people to New Orleans each year is as rich, charming and welcoming as ever. It's no surprise that the New York Times has named New Orleans the "Comeback of the Year" and both Orbitz and Travel + Leisure have chosen it as one of their top destinations for 2007.

New Orleans is the birthplace of jazz and the place some of the world's most popular musicians - from Louis Armstrong to Lenny Kravitz - have called home. A melting pot of musical inspirations and innovations, New Orleans has embraced music as an indelible part of its history, an important facet of its identity and one of the most colorful threads in its cultural tapestry. From street performers to intimate clubs, jazz funerals to festivals and symphonies to headlining rock concerts, music continues to permeate - and enrich - every day of life in New Orleans.

Walk the streets of New Orleans today and you'll still hear it: the hum, the beat, the rhythm. It's everywhere. It pours out of nightclubs and concert halls, rises from churches and theatres, fills the streets, echoes across festival grounds and permeates the neighborhoods. Jazzy and jubilant, soulful and spiritual, rocking and rolling - New Orleans music tells the story of the city and its people to anyone who will hear it and in the most eloquent ways imaginable.

More information about the city can be found on the New Orleans Convention & Visitors Bureau website, www.neworleanscvb.com.

WEATHER & ATTIRE

Weather in New Orleans, LA mid-November is pleasant. Daytime temperatures average in the low 70's and evening temperatures average in the low 50's.

The conference attire is business casual, including Thursday's Social Event.

LODGING INFORMATION

The conference is headquartered at The Astor Crowne Plaza (www.astorneworleans.com). The hotel is a AAA Four Diamond property and the gateway hotel to New Orleans' most exciting destination - the world famous French Quarter. Located where Bourbon Street meets Canal Street, The Astor Crowne Plaza allows for quick access to the excitement of Bourbon Street and nearby downtown attractions of Harrah's Casino, Aquarium of The Americas, Riverwalk Shopping Center, Morial Convention Center, N.O. Sports Arena and the Superdome.

A block of rooms has been reserved at The Astor Crowne Plaza with a special conference rate of $189 single or double occupancy (plus tax and a $2/night room night occupancy fee). Club level accommodations are available at $239/night, subject to availability. To guarantee the conference rate, reservations must be made no later than October 12, 2007 by calling (888) 696-4806 and referencing group code "National Association - AEP". The conference rate cannot be guaranteed for reservations made after October 12, 2007.

CANCELLATION POLICY

Any cancellation of a conference registration must be received in writing. A full refund will be given if notice is received on or before September 28, 2007. Registrants who cancel between September 28, 2007 and October 31, 2007 will forfeit a $100 administrative fee. No refunds will be granted after November 1, 2007. Refund or credit will not be issued to no-show registrants.

HABITAT FOR HUMANITY® VOLUNTEER EVENT

The NAEPC is teaming up with New Orleans Area Habitat for Humanity® to host a volunteer experience on Saturday, November 17, 2007 from 6:30 am - 3:00 pm. The organization offers opportunities for conference attendees, sponsors and companions to help with all aspects of home building in a targeted area of the city. Volunteers do not need to be an expert in construction to help out on a work site, but must be at least 16 years of age or older to participate. Those who are 14 and 15 are allowed on site but must have direct adult supervision and are limited in the tasks they can perform such as painting or landscaping. Ultra hazardous activity such as using power tools, excavation, demolition or working on rooftops is not permitted by anyone under the age of 18.

Specific details about the work site will be available closer to the beginning of the conference. Transportation to and from the job site will be provided. Please be sure to indicate your participation, and that of any additional volunteers, by stating the same on the registration form.

PROGRAM MATERIALS & ROSTER OF ATTENDEES

All Council Leadership Day and Educational Registrants will receive the technical materials in two formats – a CD that contains long outlines from each speaker (if provided) and a binder that contains a short outline from each speaker (if provided). Registrants are encouraged to bring a laptop computer to access the materials on the CD. Long outlines will also be provided on the internet prior to the conference provided the speaker has given the NAEPC permission to do so. Each registrant will be furnished with a printed roster of attendees of those that registered prior to October 31, 2007.

TRANSPORTATION INFORMATION

AIR TRAVEL — Travel discounts are available for attendees utilizing Continental Airlines between November 7-30, 2007. To make reservations, contact your travel professional directly, Continental Airlines MeetingWorks at (800) 468-7022 or book a reservation on www.continental.com (an additional 3% discount applies when booking online). The following information is required to receive the discounted rate: Agreement Code C406H4 / Z Code ZAHY.

RENTAL CAR DISCOUNT — The NAEPC has arranged for special discount rates with Hertz for rentals between November 5 - 23, 2007. To make reservations, call Hertz directly at (800) 654-2240 and reference group code CV#03WB0002. Driving directions to the hotel can be found online at www.astorneworleans.com and valet parking is available at a daily rate of $24.95/day.

TAXICAB & SHUTTLE DISCOUNT — NAEPC has arranged for discounts for passengers utilizing Airport Shuttle New Orleans for round trip transportation. Reservations must be made online at this address: http://www.hudsonltd4.com/cgi-bin/asno1/res?USERIDENTRY=NAEPC1107&LOGON=GO. A link is also available on the conferences page of www.naepc.org. Airport Shuttle can be reached at (504) 522-3500 or www.airportshuttleneworleans.com.

Capital One private client group

COVENTRY
REDEFINING INSURANCE®

Merrill Lynch
Merrill Lynch Trust

Whitney
Trust & Wealth Management

Charles Schwab Institutional

CircleLending

Guardian

New York Life Insurance Company

Northwestern Mutual

The Glenmede Trust Company, N.A.

National Association of Estate Planners & Councils — 1120 Chester Ave., Ste. 470 — Cleveland, OH 44114-3514 — Phone: 866-226-2224 — Fax: 216-696-2582 — www.naepc.org — conference@naepc.org

44th Annual Conference

National Association of Estate Planners & Councils
1120 Chester Ave., Suite 470
Cleveland, OH 44114-3514

First Class Mail
U.S. Postage
PAID
Cleveland, OH
Permit #1934