



# 54<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

with Pre-Conference Sessions for Council Leaders

• EDUCATION • COLLABORATION

November 15 - 17, 2017  
New Orleans, Louisiana · The Roosevelt

## Pre-Conference · Council Leader Day November 15, 2017

• Sessions begin at 7:00 am •

Council Leader Day offers a learning and sharing experience for volunteer leaders and staff of estate planning councils from across the country. The morning includes an abbreviated Annual Meeting, the Council of Excellence Awards presentation, and a special session for council leaders, **“Communication Across Generations and the Impact of Family Philanthropy”** provided by Sharna Goldseker of 21/64.

The entire afternoon is devoted to private, volunteer-led discussion groups for leaders from councils of like-size. Meetings with the NAEPC Webmaster will also be available.

Council Leader Day concludes with the conference welcome reception at 5:00 pm for all registered attendees & companions.

### Estate Planning Hall of Fame®

• 2017 ENTRANTS •

Vincent M. D'Addona, CLU®, ChFC®, RICP®, RFC, CExp™, MSFS

Donald O. Jansen, JD, LL.M.

R. Hugh Magill, JD

Edward Mendlowitz, CPA

Joshua S. Rubenstein, JD

John J. Scroggin, JD, LL.M., (taxation)

Please join us at the induction ceremony on Friday morning.

## Annual Conference Day I November 16, 2017



9<sup>th</sup> Annual 2-Mile  
Fun Run & Walk, 5:45 am

Companion Tour · 9:00 am – 3:00 pm

7:00 am Bonus Session provided by Berkshire Settlements, Inc.  
*Life Insurance in Estate Planning: Beyond the Role of Benefits for Beneficiaries & Tax Strategies*  
Darwin M. Bayston, CFA

*Modern Uses of Partnerships in Estate Planning*

Paul S. Lee, JD, LL.M. (taxation),  
AEP® (Distinguished)

*Product Selection and Design: Which Type of Product to Use in Common Estate and Financial Planning Scenarios and How to Design and Fund It*  
Charles L. Ratner, JD, CLU®, ChFC®,  
AEP® (Distinguished)

Sponsored General Session provided by Ashar Group / Ashar SMV  
*Advanced Planning Applications for Market-Based Life Insurance Valuations*  
William J. Clark, Jamie L. Mendelsohn  
& Jon B. Mendelsohn

*How Slippage and Gray Areas Lead Us into Ethical Lapses*  
Marianne M. Jennings, JD

*Minimizing Family Conflicts in Estate Planning*  
John J. Scroggin, JD, LL.M., (taxation),  
AEP® (Distinguished) Nominee

*Current Issues in Estate and Gift Tax Audits and Litigation*  
John W. Porter, B.B.A., JD,  
AEP® (Distinguished)

**Exclusive AEP® Designee & EPLS Session, 5:15 pm**  
*A Discussion with Turney P. Berry, JD,*  
AEP® (Distinguished)

## Annual Conference Day II November 17, 2017

Companion Tour · 9:00 am – 3:00 pm

*Tax-Efficient Drawdown Strategies During Retirement*

Robert S. Keebler, CPA/PFS, MST,  
AEP® (Distinguished), CGMA

*Estate Planning Current Developments and Hot Topics*  
Steve R. Akers, JD, AEP® (Distinguished)

Sponsored General Session provided by Asset Protection Council® / Lodmell & Lodmell, P.C.  
*Understanding Asset Protection in the 21st Century*  
Douglass S. Lodmell, JD, LL.M.

*The Use of Non-Grantor Trusts for State Income Tax Minimization*  
William D. Lipkind, JD, LL.M.

*Planning for Privacy in a Public World: The Ethics and Mechanics of Protecting your Client's Privacy and Personal Security*  
John Bergner, JD &  
Jeff Chadwick, JD

*Subchapter J - Income Taxation of Trusts & Estates*  
Mickey R. Davis, JD &  
Melissa J. Willms, JD, LL.M.

• Sessions conclude at 4:45 pm •

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**Lodging Information ·**

NAEPC is delighted to host its 54<sup>th</sup> Annual Conference at The Roosevelt New Orleans. Steeped in history, The Roosevelt New Orleans and the land on which it sits was home to many interesting buildings prior to opening as the lavish Grunewald Hotel in 1893. To learn more about the history of this special hotel, click [HERE](#).

The NAEPC room rate is \$279 / night single or double occupancy (plus applicable taxes and fees). Additional room and suite options are available. Reservations can be made online at [www.NAEPc.org/conference](http://www.NAEPc.org/conference) or by calling (888) 887-1006 and letting the reservationist know you are with NAEPC. **Reservations must be made by 10/20/17.**

**Cancellation Policy ·**

Any cancellation must be received in writing or via email to conference@naepc.org. A full refund will be granted if notice is received on or before 09/29/17. Registrants who cancel between 09/30/17 and 10/31/17 will forfeit a \$100 administrative fee. No refunds will be granted on or after 11/01/17. Requests to transfer a registration will be accommodated.

**Continuing Education Credit ·**

Continuing education credit will be available nationwide for estate planning-related disciplines to those who attend the Thursday & Friday technical education sessions (pending approval by governing bodies). **Life insurance professionals must attend the entire conference to receive credit as partial credit is not available.**

**Registrant Discounts ·**

- \$50 Early Bird Discount (registration must be received by 09/30/17)
- \$50 Active AEP® or EPLS designee
- \$50 Host Council Discount for Members of New Orleans EPC
- \$100 NAEPC Volunteer Discount (available to non-board members of any committee of NAEPC)

REGISTER ONLINE  
[www.NAEPc.org/conference](http://www.NAEPc.org/conference)

Last Name	First Name & Middle Initial
Professional Designations	Nickname for Nametag Purposes
Company Name	Street Address
City, State & Zip	Telephone Number
Email Address	Fax Number
Affiliated Local Council Membership	
Companion Last Name, First Name, and Nickname for Nametag Purposes	
Companion Street Address, City, State & Zip Code	
Companion Telephone Number	Companion Email Address

**Annual Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders · \$1,125**

*The registration fee includes Council Leader Day sessions and technical education sessions, presentation material, conference breakfasts & luncheons & the Wednesday evening welcome reception. Council Executives / Administrators (paid staff) are eligible to attend the Council Leader Day Sessions at no charge.*

- I will attend the welcome reception on Wednesday, November 15, 2017
- I will participate in the fun run on Thursday, November 16, 2017 at 5:45 am
- I am an active AEP® or EPLS and will participate in the private session on Thursday, November 16, 2017
- I have read and understand both the continuing education credit and cancellation policies (left panel)

**Annual Advanced Estate Planning Strategies Conference · \$1,025 (member\*) \$1,250 (non-member)**

*The registration fee includes the Wednesday evening welcome reception, technical education sessions, presentation material & conference breakfasts & luncheons.*

- I will attend the welcome reception on Wednesday, November 15, 2017
- I will participate in the fun run on Thursday, November 16, 2017 at 5:45 am
- I am an active AEP® or EPLS and will participate in the private session on Thursday, November 16, 2017
- I have read and understand both the continuing education credit and cancellation policies (left panel)

**Companion Registration Package · \$475**

*The companion program is offered as an accompaniment to the annual conference for those who will be attending with a regular registrant, but will not be taking advantage of the educational sessions. The registration fee includes conference breakfasts, the Thursday & Friday tours & Wednesday welcome reception. Tour titles will be released online.*

- I will attend the welcome reception on Wednesday, November 15, 2017
- I will participate in the fun run on Thursday, November 16, 2017 at 5:45 am
- I will attend the companion tour on Thursday, November 16, 2017
- I will attend the companion tour on Friday, November 17, 2017

**Fee Computation & Payment**

Primary Registrant Fee	_____
Less discount(s) - see left panel	_____
Companion Registrant Fee	_____
Subtotal	_____
Add \$50 late fee if postmarked on or after 10/31/17 - TOTAL	=====

*\*A member is defined as an active Accredited Estate Planner® designee, Estate Planning Law Specialist certificant or member of an estate planning council affiliated with NAEPC.*

Make check payable to "NAEPC" and mail to address at the top of the page, register online at [www.naepc.org](http://www.naepc.org), or fax this page with credit card information to (216) 696-2582.

Account Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

Additional information is available at [www.NAEPc.org/conference](http://www.NAEPc.org/conference).