



MONDAY, NOVEMBER 14, 2022

5:30 pm – 8:30 pm · Registration Open
Caribbean Ballroom Registration Desk

TUESDAY, NOVEMBER 15, 2022 COUNCIL LEADERSHIP DAY

The day of sessions cultivated for estate planning council leaders and excellence in council operations...

6:30 am – 6:00 pm · Registration Open
Caribbean Ballroom Registration Desk

7:00 am - 8:00 am · Breakfast
Grand Ballroom Foyer

8:00 am - 8:40 am · Learning Pod #1
See nametag for room assignment

8:50 am - 9:30 am · Learning Pod #2
See nametag for room assignment

8:50 am - 10:30 am · Private Council Executive Session
with NAEPC Webmaster
Caribbean Ballroom 1

9:30 am - 9:50 am · Conversation Break
Foyer

9:50 am - 10:30 am · Learning Pod #3
See nametag for room assignment

10:30 am - 10:45 am · Conversation Break
Foyer

10:45 am - 12:20 pm · NAEPC Annual Meeting &
Awards Luncheon
Caribbean Ballroom 4/5

12:30 pm - 1:30 pm · Learning Pod #4
See nametag for room assignment

1:40 pm - 2:30 pm · Learning Pod #5
See nametag for room assignment

2:30 pm - 2:45 pm · Conversation Break
Foyer

2:45 pm - 3:45 pm · Council by Size Sharing Session
See nametag for room assignment

3:45 pm - 4:00 pm · Conversation Break
Foyer

4:00 pm - 5:00 pm · Resume Council by Size Sharing
Return to Previous Room

5:00 pm - 6:00 pm · Opening Reception with Exhibitors
Grand Ballroom

6:00 pm · Private Council Staff Executive Dinner
Meet at NAEPC Registration Desk at 6:00 pm

**Council Leadership Day &
Opening Reception Sponsors**



WEDNESDAY, NOVEMBER 16, 2022

5:30 am – 6:00 pm · Registration Open
Caribbean Ballroom Registration Desk

5:45 am · 2-Mile Fun Run & Walk
Meet at North Beach (entrance is in front of the Ocean View Terrace, green turf area)

6:30 am - 8:00 am · Breakfast with Exhibitors
Grand Ballroom

7:00 am - 7:45 am · Sponsor Bonus Workshops

Oil & Gas, Renewable Energy, Farm & Ranch, and
Timber Assets: Fiduciary Duty & Challenges
Clayton Becker & Chace Daley
Grand Ballroom B

What Every Attorney Should Know About Valuations
Evan Levine, ChFC® & Nainesh Shah, CFA®, CVA®
Grand Ballroom C

Building an Entrepreneurial Law Firm
Dave Zumpano, Esq., CPA
Grand Ballroom D

8:00 am - 8:30 am · Welcome & Opening Remarks
Caribbean Ballroom

8:30 am - 12:00 pm · Council Staff Executive Session
Grand Ballroom A

8:30 am - 9:30 am · Federal Tax Update
Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)
Caribbean Ballroom

9:30 am - 10:30 am · Understanding Block Chain
and Digital Assets
Ric Edelman
Caribbean Ballroom

10:30 am - 11:00 am · Break with Exhibitors
Grand Ballroom

11:00 am - 12:00 pm · Life Settlement and
Life Insurance Valuation Solutions for
Estate and Tax Professionals
Jamie L. Mendelsohn, Jon B. Mendelsohn &
Todd Steinberg, JD
Caribbean Ballroom

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Virtual delivery will take place in Eastern Time.**

12:00 pm - 1:30 pm · Lunch with Exhibitors
Grand Ballroom

1:30 pm - 2:30 pm · Repairing Racial Wealth
Disparity Using the Estate Tax and New Charitable
Incentives
Raymond C. Odom, JD, CFP®
Caribbean Ballroom

2:30 pm - 3:30 pm · Impact of the Buy-Sell
Agreement on Estate Planning for Business
Owners
April Caudill, JD, CLU®, ChFC®, AEP®
Caribbean Ballroom

3:30 pm - 4:00 pm · Break with Exhibitors
Grand Ballroom

4:00 pm - 5:00 pm · Mum's the Word:
Maintaining Client Confidentiality and Dealing
with Ethical Challenges while Working from
Anywhere and Everywhere
Jeffrey D. Chadwick, JD
Caribbean Ballroom

5:00 pm - 6:30 pm · Reception with Exhibitors
Grand Ballroom

Today's Reception Sponsors



Special Sponsors

Mid-Morning Coffee

Brentmark, Inc.
Withum

Luncheons

Brentmark, Inc.

Notepads

The Nokbox

Water Stations

Legacy Enhancement

Key Cards

Ashar Group

Audio-Visual

Morgan Stanley
Wealth Management

Power Stations

Premier Trust

THURSDAY, NOVEMBER 17, 2022

6:00 am – 4:30 pm · Registration Open
Caribbean Ballroom Registration Desk

6:30 am - 7:30 am · Breakfast with Exhibitors
Grand Ballroom

7:00 am · Private Breakfast

7:00 am - 7:45 am · Sponsor Bonus Workshops
Advanced, Sustainable Digital Marketing Techniques
Designed to Scale Your Practice Ethically
Tom Foster
Grand Ballroom B

Life Insurance & the Estate Plan - Don't Let Cocktails,
Coronaries, and Cannabis Derail the Planning Process
Dennis C. Bartos, PA & Cathy Neifeld, JD
Grand Ballroom C

What Every Estate Planning Professional should know
about Commercial Real Estate
David G. Bradley & Justin W. West
Grand Ballroom D

7:50 am - 8:15 am · Opening Remarks
Caribbean Ballroom

8:15 am - 8:30 am · Presentation of Hartman Axley
Lifetime Service Award & Robert E. Fox Volunteer
Service Award
Caribbean Ballroom

8:30 am - 9:30 am · Understanding Blockchain and
Digital Assets 2.0: Taxation, Reporting, and Planning
Abigail Rosen Earthman, JD, LL.M.
Caribbean Ballroom

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

10:00 am - 10:30 am · Break with Exhibitors
Grand Ballroom

10:30 am - 11:30 am · Tax-Smart Charitable Giving,
Especially with Retirement Assets
Christopher Hoyt, JD, AEP® (Distinguished)
Caribbean Ballroom

11:35 am - 12:35 pm · Using Home Equity in Estate
Planning: How a Client's Home can Impact their
Retirement Options
Harlan Accola, CRMP
Caribbean Ballroom

12:35 pm - 1:35 pm · Lunch with Exhibitors
Grand Ballroom

1:35 pm - 2:35 pm · Estate Planning for Modern
Families: Planning for Diversity and Flexibility
Wendy S. Goffe, JD, AEP® (Distinguished) &
Kim Kamin, JD, BA, AEP® (Distinguished) Nominee
Caribbean Ballroom

2:35 pm - 3:05 pm · Final Break with Exhibitors
Grand Ballroom

3:05 pm - 4:05 pm · Estate of Michael J. Jackson v.
Commissioner, T.C. Memo 2021-48:
"The Tax Trial of the Century"
Michael A. Perlmutter, JD, CPA, CVA®, ABAR
Caribbean Ballroom

4:15 pm - 5:30 pm · Private Session
for Active AEP® Designees and EPLS
Certificants
Top Ten Estate Planning Lessons
Learned from Recently Deceased
Celebrities
Eido M. Walny, Atty, AEP®, EPLS
Grand Ballroom A – C



6:30 pm · Private President's Reception

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FRIDAY, NOVEMBER 18, 2022

7:00 am – 12:15 pm · Registration Open
Caribbean Ballroom Registration Desk

7:30 am - 8:30 am · Breakfast
Caribbean Ballroom Foyer

7:30 am - 8:30 am · Special Breakfast Session
Accredited Estate Planner® Designation from A-Z
Clearwater

8:30 am - 8:45 am · Opening Remarks and
Bingo Drawing
Caribbean Ballroom

8:45 am - 9:50 am · Special Needs Planning – How to
Plan for Beneficiaries with Disabilities
Elizabeth Forspan, Esq.
Caribbean Ballroom

9:50 am - 10:55 am · How to Taylor Your Trust for a
Swift Resolution: You are Never Ever Reaching Those
Assets. Ever.
Amy K. Kanyuk, JD &
Melissa Langa, A.B., JD, LL.M. (taxation), AEP®
Caribbean Ballroom

10:55 am - 11:10 am · Break
Caribbean Ballroom Foyer

11:10 am - 12:10 pm · Recent Developments in
Fiduciary Litigation
Meghan Gehr Hubbard, JD
Caribbean Ballroom

12:10 pm - 12:15 pm · Closing Remarks
Caribbean Ballroom



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SAVE THE DATE

November 12 - 16, 2023

60th Annual NAEPC Advanced Estate
Planning Strategies Conference
Fort Lauderdale, Florida



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