60th Annual NAEPC
Advanced Estate Planning
Strategies Conference &
Council Leadership Conference

November 12 - 16, 2023
Fort Lauderdale, Florida
Marriott Harbor Beach Resort & Spa

REGISTER ONLINE
NAEPC.org/conference
Dear NAEPC Members & Friends,

As we prepare to gather in Fort Lauderdale and within our virtual community, we would like to take a moment to thank you for your membership, support, and work on behalf of the estate planning profession. Our association is as strong as our membership, and you have proven to be committed to a mission that matches ours... collaboration with other professionals, a lifelong learner, and someone who thrives on the cultivation of new and meaningful relationships.

The 60th Annual Conference and Council Leadership Conference have a new look and feel this year! We’ll focus first on the educational portion of the program, which is available to anyone within the profession of estate planning, regardless of membership status within a local Estate Planning Council. Certain educational sessions will also be available virtually so please look for the icon indicating the same as you browse this brochure. Following, we’ll host the Council Leadership Conference (formerly known as “Council Leadership Day”) where leaders from councils around the country convene to discuss important operations and council management topics. These sessions are limited to individuals currently serving as a volunteer board member or staff executive / administrator for a local council.

We would be remiss if we did not acknowledge the generous sponsors that make it possible for NAEPC to offer this conference, some of which are shown below. Please be sure to keep these firms in mind throughout the year.

We look forward to welcoming you to the conference of choice for estate planning professionals from November 12 – 16, 2023.

John T. Midgett, JD, AEP®
2023 President

Richard K. MacBarron, JD, CFP®, ChFC®, CLU®, CBEC®, AEP®
60th Annual Conference Chairperson

60th Annual NAEPC Advanced Estate Planning Strategies Conference

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Theresa L. Hughes, MBA, CTFA, AEP®
Pinion Individual Trustee Services
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Peter J. Strauss, Esq
Pierro, Connor & Strauss LLC
New York, NY

Susan M. Tillery, CPA/PFS, AEP® (Distinguished)
Paraklete® Financial, Inc.
Kennesaw, GA
AGENDA

SUNDAY, NOVEMBER 12, 2023
All times are Eastern Time

11:00 am - 7:00 pm
Registration Open for Exhibitors, Annual Conference Attendees, Monday Single-Day Passholders, and Annual Conference Attendees with Council Leadership Conference Pass

3:00 pm - 4:00 pm
NAEPC Past President’s Council Meeting (invitation only)

4:30 pm - 5:00 pm
Social Registrant / Guest Meet-Up

5:00 pm - 6:30 pm
Kick-Off Welcome Reception with Exhibitors

MONDAY, NOVEMBER 13, 2023

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

7:00 am - 7:45 am
Concurrent Sponsored Workshops (choose one)

Option One
Session TBD

Option Two
Session TBD

8:00 am - 9:00 am
Breakout Sessions (choose one)

Determining a Client’s Retirement Income
Wade D. Pfau, PhD, CFA®, RICP®

Riding the Age Wave: Sharpen Your Skills To Serve Clients Who Demand Independence, Financial Security and Peace of Mind Throughout Retirement
Louis W. Pierro, Esq. and Peter J. Strauss, Esq.

9:05 am - 10:05 am
Breakout Sessions (choose one)

Charitable Planning with Non-Conventional Assets
Brian K. Clontz, Ph.D., ChSNC®, RICP®, CAP®, CLU®, ChFC®, CFP®, AEP® (Distinguished)

The End of Life for Insurance in the Estate Plan - Death Benefit, Surrender, Lapse or Settlement?
Tama Brooks Klosek, JD

Scarier Than Lions and Tigers and Bears: Income Taxation of Trusts, Oh My!
Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®

10:05 am - 10:35 am
Break with Exhibitors

10:35 am - 11:05 am
Conference Opening Remarks & NAEPC 2023 Annual Meeting
AGENDA

11:05 am - 12:05 pm
Federal Tax Update
Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)

12:05 pm - 1:30 pm
Lunch with Exhibitors
Concurrent Private Luncheon for Estate Planning Council Leaders (arranged by region)

1:30 pm - 2:30 pm
Unique Planning Solutions using Existing Life Insurance Policies
Katie Bennett, CVA, LaToya Encarnacion, Jamie L. Mendelsohn, and Jon B. Mendelsohn
Offered by Ashar Group Life Settlements and Life Insurance Valuations

2:30 pm - 3:30 pm
TCJA: Critical Income Tax Planning Concepts for Sunset
Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA®

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

4:00 pm - 5:00 pm
Cross Border Wealth Planning
Joan K. Crain, CFP®, TEP, AEP® (Distinguished)

6:00 pm
President’s Reception (invitation only)

Honors, Awards, and Accolades

Robert E. Fox, CLU®, AEP® Volunteer Service Award
Recognizing exceptional volunteer service to an estate planning council, a local community, or to NAEPC during the prior year.

2023 Recipient: Not Yet Named

NAEPC Estate Planning Hall of Fame®
Offered in recognition of distinguished service to the field of estate planning.

2023 Entrants: Lyle K. Benson, Jr., CFP®, CPA/PFS, MST
Clark Monroe Blackman, II, CFP®, CFA, CPA/PFS, CGMA, AIF®, AAMS
David M. English, JD
Todd A. Flubacher, JD
Abraham Frank Johns, Jr., JD, LL.M. (elder & disability law), CELA®
Kim Kamin, JD, BA
Mary E. Vandenack, JD, CAP®

Hartman Axley Lifetime Service Award
Honoring those who have been highly active in the estate planning community and crucial to the development of NAEPC.

2023 Recipient: Lawrence P. Katzenstein, Atty, AEP® (Distinguished) of Thompson Coburn, LLP
6:30 am - 8:00 am
Breakfast with Exhibitors

7:00 am - 7:45 am
Concurrent Sponsored Workshops (choose one)

Option One
Distribution of Estate Assets: Where does All the Stuff Go?
Sharon McRill
Offered by Betty Brigade

Option Two
Session TBD

8:00 am - 9:00 am
Breakout Sessions (choose one)

Wealth Planning for Americans Abroad; Specific Considerations
Joan K. Crain, CFP®, TEP, AEP® (Distinguished)

Don’t Guess and Make a Mess with QSBS
Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®

9:05 am - 10:05 am
Breakout Sessions (choose one)

How to Use Life Insurance
Valuations in Your Financial, Charitable, Estate or Tax Planning Practice
Katie Bennett, CVA, LaToya Encarnacion, and Jamie L. Mendelsohn

Introduction to ESG
Investing and Diversity Considerations in Investing
Bikram Chadha

Post-Mortem Elections
Jeremiah W. Doyle IV, JD, LL.M. (taxation), LL.M. (banking law), AEP® (Distinguished)

10:05 am - 10:30 am
Break with Exhibitors

10:30 am - 11:00 am
Daily Remarks and Presentation of Robert E. Fox, CLU®, AEP® Volunteer & Hartman Axley Lifetime Service Awards

11:00 am - 12:00 pm
Elder Law and Special Needs Planning
Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP® (Distinguished)

12:00 pm - 12:30 pm
NAEPC Estate Planning Hall of Fame® Induction Ceremony

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

REGISTER ONLINE
NAEPC.org/conference

TUESDAY, NOVEMBER 14, 2023
All times are Eastern Time
1:30 pm - 2:30 pm
Flip A Coin...Does your Living Will Protect or Harm You?
Jestin Carlson, MD, MS, MHA, CPE and Ferdinando L. Mirarchi, DO, FAAEM, FACEP
Offered by MIDEO Health

2:30 pm - 3:00 pm
Break with Exhibitors

3:00 pm - 4:00 pm
Love, Sex, Money, Marriage and Death: Estate Planning Aspects of Divorce
Jeremiah W. Doyle IV, JD, LL.M. (taxation), LL.M. (banking law), AEP® (Distinguished)

4:00 pm - 5:00 pm
Cross-Disciplinary Panel on NAEPCs Core Value: Multi-Disciplinary Teaming
Aquanetta J. Betts, JD, CAP®, AEP®, CFRE, Theresa L. Hughes, MBA, CTFA, AEP®,
Karly A. Laughlin, CPA, AEP®, Jennifer E. Smith, JD, LL.M. (taxation), AEP®, and
Susan M. Tillery, CPA/PFS, AEP® (Distinguished)

5:00 pm - 6:30 pm
Reception with Exhibitors

WEDNESDAY, NOVEMBER 15, 2023

5:45 am - Michael W. Halloran 2-Mile Fun Run and Walk

7:00 am - 8:00 am
Breakfast with Exhibitors
Supplemental Breakfast: AEP® from A - Z

8:00 am - 8:10 am
Daily Remarks

8:10 am - 9:10 am
Cyber Fraud & Personal Security Insights – Key Strategies in Protecting your Family and Wealth
Gary F. Rossi

9:10 am - 10:10 am
Strategies for Transitioning Real Estate Wealth to Heirs & Important Tax Structuring Considerations
William Fox, CPA, Richard Reuter, CPA, CGMA, and Timothy Wallen, CPA
Offered by MLG Capital

10:10 am - 10:25 am
Break with Exhibitors

10:25 am - 11:25 am
Technology Traps and Reply All Regrets: Ethical Issues for both Tech Geeks and Luddites
Michael H. Rubin, JD *Please note: Virtual Delivery for this session is audio-only.

11:25 am - 12:25 pm (closing remarks at 12:25 pm)
Capitalizing on Estate Planning Opportunities for High Net Worth Clients in Today’s Environment
S. Stacy Eastland, JD, AEP® (Distinguished)

12:30 pm - 1:30 pm  Lunch with Exhibitors / Exhibit Hall Closes
Invest in your council today!

The Council Leadership Conference is the best way to learn about what other councils are doing, where they have found success, and how they have overcome struggles in the post-pandemic world.

NAEPC recommends sending at least one leader at the vice-president level or below and the council’s staff executive / administrator (staff registration is complimentary).
CONTINUING EDUCATION CREDIT

The following credit will be requested in all states for both the in-person and virtual program: legal, accounting, CFP®, CTFA, and PACE (including one hour of ethics credit, where applicable) starting 11/13/23 and going through 11/15/23 at 12:25 pm as follows.

In-Person Attendance - Up to 16 Hours

The program will not be filed for insurance or legal specialization credit. Individual states and governing bodies, coupled with your attendance, determine the total number and type of credit awarded. License numbers are required on-site to receive credit. Approval status will be communicated on our website approximately six weeks pre-conference.

Select sessions will be delivered virtually. Virtual credit will be available to those who attend the LIVE delivery of the sessions and to the extent that states and disciplines allow for this type of credit. Continuing education credit is administered by our partner, the Society of FSP.
HOST RESORT & LODGING

We are delighted to return to Marriott Harbor Beach Resort & Spa for the 60th Annual Conference. The hotel perfectly blends relaxed tropical serenity with Marriott’s well-known standard of service. Attendees will experience a beachfront location with modern and plentiful amenities close to shops, dining, and nightlife for the perfect marriage of education + relaxation.

The NAEPC room rate is $269 (single / double occupancy, exclusive of tax) plus a $15 resort fee. Reservations for overnight accommodations should be made by 10/20/23 by calling 954-525-4000 and letting the reservationist know you are attending the NAEPC conference or by using the online reservation link: https://book.passkey.com/e/50514152.

Please contact the NAEPC office if you experience any trouble during the booking process.

SOCIAL REGISTRANTS & GUESTS

While the conference will not have a formal companion program, we plan on making sure those who accompany a registrant feel warm and welcome. A Social Registrant package is available that includes all conference breakfasts and receptions. We’ll also be hosting a brief Social Registrant / Guest Meet Up on Sunday, November 12, 2023 at 4:30 pm. Please make sure to share the name and full contact details of conference companions at the time of registration so we can communicate directly with them about this event.

EXPLORE FORT LAUDERDALE & MIAMI

Start planning your time in Florida now by letting Visit Lauderdale and the nearby Greater Miami Convention and Visitors Bureau help! These two organizations have all of the information you need to plan an exciting trip.
VOLUNTEER WITH NAEPC

We are always looking to expand our volunteer base and encourage designees, council leaders and members to get involved by serving as a committee member. Learn More

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60th Annual NAEPC Advanced Estate Planning Strategies Conference

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TEN REASONS TO ATTEND

1) Nationally recognized speakers

2) COLLABORATE on cutting-edge ideas and trends

3) Advanced topics of interest to EDUCATE every member of every estate planning council and all estate planning professionals: attorneys, trust professionals, accountants, philanthropic professionals, elder law specialists, wealth management professionals, insurance and financial planning professionals

4) An intimate setting that provides ample time to CULTIVATE relationships with speakers and other attendees

5) Multi-disciplinary continuing education credit

6) Content will address a wide-range of today’s most important tax and non-tax issues, providing practical guidance on planning effectively in today’s environment

7) In-person and virtual options to meet your needs with competitive registration fees

8) Access to conference supporters and NAEPC member benefit providers, along with special bonus workshops and an "Ask the Expert" lounge with Ashar Group

9) CELEBRATE 60 YEARS OF EDUCATIONAL EXCELLENCE IN ESTATE PLANNING

10) Florida... in November!

Virtual Registration Offered for Select Sessions