REGISTER ONLINE

NAEPC.org/conference

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

November 12 - 16, 2023

Fort Lauderdale, Florida

Marriott Harbor Beach Resort & Spa

VIRTUAL OFFERING

Virtual Registration Offered for Select Sessions

NAEPC

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

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WELCOME & SPONSORS

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®	Richard K. MacBarron, JD, CFP®, ChFC®, CLU®, CBEC®, AEP®
2023 President	60th Annual Conference Chairperson

60th Annual NAEPC Advanced Estate Planning Strategies Conference

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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)

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)

Determining a Client's Retirement Income Style and an Update on SECURE Act 2.0's Implications for 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 VIRTUAL OFFERING

AGENDA

All times are Eastern Time

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

12:05 pm - 1:30 pm
Lunch with Exhibitors

BONUS COUNCIL LEADER SESSION
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 VIRTUAL OFFERING
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® VIRTUAL OFFERING

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) VIRTUAL OFFERING

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

AGENDA

TUESDAY, NOVEMBER 14, 2023

All times are Eastern Time

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)

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)

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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
VIRTUAL OFFERING

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

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

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

Concurrent Private Luncheon for Accredited Estate Planner® Designees
AEP® OFFERING
The Sounds of Collaboration
Revisit your Youth during this Fun Mid-Day Break from Conference Sessions

AGENDA

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

VIRTUAL OFFERING

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)

VIRTUAL OFFERING

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)

VIRTUAL OFFERING

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

VIRTUAL OFFERING

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

VIRTUAL OFFERING

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.

VIRTUAL OFFERING

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)

VIRTUAL OFFERING

12:30 pm - 1:30 pm Lunch with Exhibitors / Exhibit Hall Closes

COUNCIL LEADERSHIP CONFERENCE AGENDA

WEDNESDAY, NOVEMBER 15, 2023

All times are Eastern Time

7:30 am - 1:30 pm
Council Staff Executive / Administrator Breakfast, Development Session & Lunch

12:30 pm - 1:30 pm
Lunch with Exhibitors for All Council Leadership Conference Attendees

2:00 pm - 3:15 pm
Kick-Off Topic-Based Sessions

3:15 pm - 3:45 pm
Networking Break

3:45 pm - 5:00 pm
Topic-Based Sessions Resume

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).

5:00 pm - 6:30 pm
Estate Planning Council of Excellence, 5-Star Council, and Emerging Council Annual Awards Reception

6:30 pm
Council Staff Executive / Administrator Private Dinner

THURSDAY, NOVEMBER 16, 2023

7:00 am - 8:00 am
Breakfast in the Sun

8:00 am - 9:45 am
Private Council Staff Executive / Administrator Session with Webmaster

8:00 am - 9:45 am
Topic-Based Sessions

9:45 am - 10:15 am
Networking Break

10:15 am - 12:00 pm
Topic-Based Sessions Resume

12:00 pm
Foyer Farewell / Council Leadership Conference Ends

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REGISTRATION, VIRTUAL ATTENDANCE, CONTINUING EDUCATION

DISCOUNTS
- $50 Accredited Estate Planner Designee®
- $50 Florida Council Member
- $100 NAEPC Volunteer (currently serving on a committee)

FEES & REGISTRATION

Pricing is shown as:
Early (on or before 08/18/23) · Regular (08/19/23 - 10/19/23) · Late (10/20/23 or later)

Advanced Estate Planning Strategies Conference with Council Leadership Conference Pass	$1,445 · $1,495 · $1,545
Advanced Estate Planning Strategies Conference (In-Person or Virtual* Attendance)	
Member	$1,345 · $1,395 · $1,445
Non-Member	$1,570 · $1,620 · $1,670
Monday or Tuesday Educational Day Pass (In-Person or Virtual* Attendance)	
Member	$545 · $595 · $645
Non-Member	$620 · $670 · $720
Wednesday Educational Half-Day Pass (In-Person or Virtual*Attendance)	
Member	$395 · $445 · $495
Non-Member	$445 · $495 · $545
Council Leadership Conference Pass	$270 · $320 · $370

VIRTUAL OFFERING

***Only Select Sessions Available for Virtual Attendance**

REGISTER ONLINE AT NAEPC.org/conference

Cancellation / Transfer: A request for a cancellation / transfer must be received via email to conference@naepc.org. A full refund for a cancellation will be granted if notice is received on or before 10/13/23. Those who cancel between 10/14/23 and 10/27/23 will forfeit a $200 administrative fee. Changes from in-person to virtual attendance or virtual to in-person attendance will be accommodated until 10/27/23. No refunds will be granted after 10/27/23 for any reason; requests to transfer registration to another individual will be accommodated.

Virtual Attendance Policy: Virtual viewing is not available to those who attend in-person.

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

Virtual Attendance - Up to 12 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.

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LODGING, GUESTS & EXPLORATION

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.

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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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