NAEPC
NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS
COLLABORATE · EDUCATE · CULTIVATE

YEARLY NO-CHARGE SPEAKER PROGRAM

15th Anniversary

The "No-Charge" speaker program is one of the most valuable benefits offered by NAEPC. The individuals noted below have agreed to speak (within noted guidelines)… **WITH THEIR HONORARIUM WAIVED**! Each speaker will present an educational topic, speak to the benefits of being a member of NAEPC, and current NAEPC board members may also be available to attend a board meeting to discuss the benefits of NAEPC affiliation in more detail. All are either past presidents, current board members, or past board members of NAEPC. **COUNCILS ARE PERMITTED TO USE ONE WEBINAR IN PLACE OF AN IN-PERSON SPEAKER, SEE PAGE 7 FOR DETAILS.** Councils must submit their enrollment/registration form to NAEPC rather than contacting speakers directly.

Please note that programs are not available during the week prior to and of the Annual NAEPC Advanced Estate Planning Strategies Conference held each November, and may be limited near the Regional Leadership Day programs, the time leading up to the conference, and during peak professional seasons.

PLEASE NOTE

Details about additional programming resources offered by NAEPC can be found at http://www.naepc.org/affiliated-councils/speakers-bureau.

Speakers*

Paul M. Caspersen, CFP®, AEP®, MS (financial planning & taxation)
Gainesville, FL
current board of directors

Al W. King, III, JD, LL.M., AEP® (Distinguished), TEP
New York, NY
past board of directors

Lawrence J. Macklin, Esq., CPA, AEP®
Baltimore, MD
current board of directors

Kit Mac Nee, CFP®, CRPC®, AEP®
Los Angeles, CA
current executive committee
current board of directors

A. Stephen McDaniel, JD, EPLS, AEP® (Distinguished)
Memphis, TN
past president

Ginger F. Mlakar, JD, CPA, AEP®
Cleveland, OH
current board of directors

Susan P. Rounds, JD, CPA, LL.M. (taxation), AEP®, TEP
Los Angeles, CA
past board of directors

Rachel L. Votto, CPA, AEP®
Ridgewood, NJ
current board of directors

Eido M. Walny, Atty, AEP®, EPLS
Milwaukee, WI
current board of directors

**Learn more about availability on each speaker's listing.*

Speaker and topic availability subject to change

Paul M. Caspersen, CFP®, MS (Financial Planning & Taxation), AEP®

V IP

Availability
Programs up to 1 hour
Virtual or In-Person Programs (when travel is permitted by his employer)

Topics: SECURE ACT Planning using Testamentary Charitable Remainder Trusts: From Concept to Completion; Top Three Ways to use Life Insurance in Charitable Planning; Direction Memo: The Importance of a Letter of Instructions in Modern Estate Planning

Paul M. Caspersen, Assistant Vice President and Sr. Philanthropic Advisor at the University of Florida, brings complex financial thinking to the charitable planning field. As a CERTIFIED FINANCIAL PLANNER™, Paul has 24 years of financial, estate, and charitable planning experience. Paul and his office have been tasked with an overall combined Gift Planning goal over $150 Million annually in deferred, real estate, and other complex gifts. He is a key member of the Senior Management Team that is directing UF's $3 Billion Dollar Campaign.

Caspersen is also Principal of Planned Giving Interactive, a charitable planning software platform. In 2011 Caspersen published the book *Direction Memo: How to Write a Letter of Instructions for Your Estate Plan*, and is regularly published in peer reviewed journals. He graduated with Honors from the College for Financial Planning, in Denver, CO with a Masters in Financial Planning and undergraduate from the University of Northern Iowa.

Recent or Upcoming Speeches through the No-charge Speaker Program

EPC of Northwest Florida (FL)
EPC of Polk County (FL)
Manatee County EPC (FL)
Pinellas County EPC (FL)
Tallahassee Regional EPC (FL)

Al W. King, III, JD, LL.M., AEP® (Distinguished), TEP

Availability
Programs up to 2 hours
Virtual or In-Person Programs (during May, June, July, or September when travel is feasible)

Topics: “Domestic Asset Protection Trust Planning in 2021 & Beyond”; “Changing the Situs of a Trust for Income Tax and Other Trust Law Benefits”; "The Modern Dynasty Trust – Who? What? When? Where? How? Why?"; “Are Irrevocable Trusts Really Irrevocable? – Reformation, Modification, Decanting and Trust Protectors”; “Why South Dakota? A Comparison of South Dakota Versus the Other Key Dynasty Trust States”; “Designing the 21st Century Irrevocable Trust”; “Popular Domestic Trust Strategies for International & Cross Border Families”; “The Next Tsunami – Charitable Giving with Non-Charitable Trusts: How the Wealthy are Using Modern Trust Structures to Provide Social and Fiscal Responsibility”; “Selecting Modern Trust Structures and Administration Based Upon a Family’s Assets”; “Interesting Trends with Trusts & Millennials”; “Is a Wealth Tax in Our Future?”; “Key Federal & State Considerations and Opportunities in 2021”

Al W. King, III is the co-founder, co-chairman and co-chief executive officer of South Dakota Trust Company LLC and South Dakota Planning Company. With currently more than $100 billion in assets under administration, South Dakota Trust Company offers pure trust administration without any product, working with whomever the client/advisor wishes regarding investments, insurance, and custody. As a result of South Dakota’s unique trust, tax, asset protection and privacy laws, SDTC works with families in 54 countries. SDTC also serves as corporate and/or trust agent for family private trust companies. Mr. King was previously managing director and national director of estate planning for Citigroup as well as the co-founder and vice chairman of Citicorp Trust South Dakota. Mr. King has been inducted into the NAEPC Estate Planning Hall of Fame®. Additionally, Mr. King was previously on the NAEPC board of directors and currently serves on its publication and webinar committees. Mr. King is the Co-Vice Chairman of the editorial board of *Trusts and Estates* magazine and has been a member for more than 29 years. He is a member of several groups and organizations, including the Society of Trust and Estate Professionals (STEP), the International Association of Advisors in Philanthropy (AiP), New York Philanthropic Advisors Network (NYPAN), Fairfield County and New York City Estate Planning Councils, etc. In addition, he is frequently published, quoted and speaks on the topic of estate and trust planning. Mr. King received a Bachelor of Arts cum laude from Holy Cross College, a Juris Doctor from Syracuse University Law School and an LL.M. in Tax Law from Boston University School of Law. Mr. King is based in New York City/Westport, CT.

Al is returning to the No-charge Speaker Program this year. He speaks frequently across the country.

Lawrence J. Macklin, Esq., CPA, AEP® V IP

Availability
Programs up to 3 hours
Primarily Virtual, In-Person Programs (when travel is permitted by his employer)

Topics: Most estate planning-related topics, including: Estate Planning for Digital Assets; Life Insurance Efficiency Planning; An Analysis of Proposals Using Life Insurance: What Works, What May Not Be as Effective as Promoted, and What Does Not Work (recently given at the Notre Dame Tax and Estate Planning Institute); Enhancing Estate Planning with Derivatives; The Partnership Freeze as an Alternative to a GRAT/SIDGT; Important Issues in Modern Trust Design; (councils are welcome to work with Mr. Macklin to choose a topic best suited to their program)

Lawrence J. Macklin is a managing director and wealth strategist with Bank of America Private Bank. He coordinates the development and delivery of innovative strategies and solutions for high net worth individuals and families in the areas of single stock concentrations, estate and wealth transfer planning, charitable giving and retirement, income tax, business succession and stock option planning. He also works closely with clients and their outside advisors to provide specialized wealth management and fiduciary services. Mr. Macklin began his tax and estate planning career in 1982 and joined Bank of America in 1994. Prior to joining Bank of America, he was associated with Venable LLP, a national law firm, as well as the accounting firm of Price Waterhouse. Mr. Macklin has served as an adjunct professor of law at Stevenson University (formerly Villa Julie College) in Baltimore, Maryland and as an adjunct professor of taxation in the graduate business program at The Johns Hopkins University. He has written for *Tax Management's Estate, Gift, and Trust Journal*, the *Journal of Wealth Management, The Practical Tax Lawyer* and various newsletters on tax and estate planning matters and has been quoted in *Entrepreneur, Financial Advisor*, and other publications. He has lectured for the Notre Dame Tax and Estate Planning Institute, various Estate Planning Councils, the Trust and Estate Study Group of the Maryland Bar, Pennsylvania Bar Institute, the Marcus Evans Private Banking Forum, Information Management Network, Financial Research Associates and Lorman Education Services. Mr. Macklin has also served as a recurring lecturer for the continuing professional education programs sponsored by the Maryland Association of Certified Public Accountants and the District of Columbia Institute of Certified Public Accountants.

Recent or Upcoming Speeches through the No-charge Speaker Program

Anne Arundel County EPC (MD)
Bucks County EPC (PA)
Charlotte EPC (FL)
Chester County EPC / Delaware County EPC (PA)
EPC of Bergen County (NJ)
EPC of Colorado Springs (CO)
EPC of Rochester (NY)
Eugene EPC (OR)
Frederick County EPC (MD)
Madison Estate Council (WI)
Milwaukee EP Forum, Inc. (WI)
Montgomery County EPC (PA)
New Mexico EPC (NM)
Northcentral Pennsylvania EPC (PA)
Red River Valley EPC (ND)
Rochester EPC (MN)
Santa Barbara EPC (CA)
Southern Delaware EPC (DE)
Tri-County EPC of the Villages (FL)
West Broward EPC (FL)
Western New York EPC (NY)

Kit Mac Nee, CFP®, CRPC®, AEP®

V IP

Availability
Programs up to 2 hours
Virtual or In-Person Programs (when travel is permitted by her employer)

Topics: Charitable Remainder Trusts; Behavioral Finance; Social Security; and Protecting Yourself from Identity Theft; Diversity in Estate Planning; 529 Planning: Transferring Millions of Dollars to Your Family; Socially Responsible Investing: Diversity, Inclusion, & Other Issues

We all need accurate information and dependable relationships. That's true no matter what we're looking for, and it's especially true when it comes to financial planning. Kit's clients trust her for two main reasons: They know she cares and they value her experience. This personal-professional combination gives her clients more confidence. We all seek out experts for important parts of our life. It's about more than just money. Her expertise is about conditioning your financial life for strength, health and endurance. Kit joined Morgan Stanley as a Financial Advisor in Pasadena, CA in 2013. Prior to joining Morgan Stanley, she was with Merrill Lynch Wealth Management for nearly nine years.

On her way to becoming a CERTIFIED FINANCIAL PLANNER™, Kit served a community foundation in Southern California as its Director of Gift Planning. She worked with donors and local charitable organizations to gain philanthropic assets that would provide a legacy of financial resources. Today, she uses her financial-planning proficiency to serve as a volunteer, board member, and consultant to guide families and charities toward more secure financial futures.

Kit raised three children, all now grown and leading fulfilling lives in different parts of the United States. She loves traveling to visit family, including trips to Detroit, her original hometown. She lives in Los Angeles and travels throughout Southern California and the U.S. to support clients as well as the community groups she works with. Her volunteer work continues as a board member for the NAEPC and St. Barnabas Senior Services. Kit is a graduate of the University of Minnesota, Carlson School of Management, earned the Certified Specialist in Planned Giving® from California State University Long Beach, American Institute of Philanthropy in 2001, and became a CERTIFIED FINANCIAL PLANNER™ and Accredited Estate Planner® designee in 2013.

Recent or Upcoming Speeches through the No-charge Speaker Program

Amarillo Area EPC (TX)
Central Pennsylvania EPC (PA)
Central Texas EPC (TX)
Colorado West EPC (CO)
Corpus Christi EPC (TX)
Eastern Illinois EPC (IL)
EPC of Central Illiana, Inc. (IN)
EPC of Central New York (NY)
EPC of Chattanooga (TN)
EPC of Rochester (NY)
EPC of Westchester County (NY)
Fairbanks EPC (AK)
Howard County EPC (MD)
Mid-Missouri EPC (MO)
Northcentral Pennsylvania EPC (PA)
Northeastern Michigan EPC (MI)
Rochester EPC (MN)
Santa Barbara EPC (CA)
Sioux Falls EPC (SD)
Siouxland EPC, Inc. (IA)
Western Dakota EPC (ND)

· Special Webinar Opportunity!

Tired of the same meeting format?

Considering new programming ideas?

Trying to engage younger members?

Why not consider adding a webinar or two? Programming is consistently noted as a key component to member satisfaction, growth, and retention and distance-learning programs are a great way to bring your EPC high-caliber speakers with little or no cost and to appeal to a new group of members.

The Robert G. Alexander Webinar Series is available to councils for live or on-demand* group showings. Councils have reported offering the webinars as a regular part of their schedule, for special "meet up" brown bag events, and even as a free member benefit or special program for AEP® designees.

Councils can opt to take advantage of either one speaker from the "no-charge" program ***or*** one group webinar in the Robert G. Alexander Webinar Series each fiscal year!

A full listing of past and upcoming programs can be found at http://www.naepc.org/events/webinar. Please indicate your webinar preference on the enrollment/registration form.

**Programs can be shown at a date and time chosen by the council as long as it is at least 48 hours after the live broadcast.*

There are over 275 councils just like yours that are members of NAEPC and within there are an estimated 30,000 members.

A. Stephen McDaniel, JD, EPLS, AEP® (Distinguished)

Availability
Coming Soon

Steve McDaniel is senior partner with largest estate planning firm in west Tennessee with a demonstrated history of working in the estate/trust world. He is skilled in estate planning and estate and trust matters, is a nationally recognized speaker having made over 75 presentations to estate planning councils and at estate planning/tax conferences in over 30 states, and was a 2020 inductee into the NAEPC Estate Planning Hall of Fame®. Steve is also a Rule 31 Mediator and an adjunct professor at University of Memphis School of Law teaching estate & gift tax, estate planning, trust & insurance law. Steve is a past president of the Memphis Estate Planning Council and the National Association of Estate Planners & Councils.

Steve is returning to the No-charge Speaker Program this year. He speaks frequently across the country.

Ginger F. Mlakar, JD, CPA, AEP®

Availability
Programs up to 1 hour
Virtual or In-Person Programs (after 01/01/2022 if travel is permitted by her employer)

Topics: Role of the Professional Advisor; Landscape of Charitable Giving; Charitable Giving Strategies and Popular Gifting Techniques; Philanthropy Trends and Best Practices; Legislative Update; Community Foundations and Charitable Planning – A View from the Inside; Navigating the Current Charitable Planning Landscape

As General Counsel & Senior Director, Philanthropic Services of the Cleveland Foundation, Ginger Mlakar serves as in-house legal counsel. As Senior Director, Philanthropic Services, she oversees the Cleveland Foundation’s donor stewardship program. In this role, she connects donors to their charitable interests. Additionally, she serves as in-house legal counsel on charitable gifting and estate administration issues and facilitates the acceptance of complex charitable gifts. She came to the Cleveland Foundation in July 2009 after 16 years practicing law in the area of estate and charitable gift planning and administration. Her previous positions include partner in the personal succession and planning practice group at Thompson Hine LLP and of counsel in the estate planning and probate practice group at Benesch, Friedlander, Coplan & Aronoff LLP. She is also a certified public accountant.

Ginger has served on the boards of several area organizations, including the Girl Scouts of Lake Erie Council, the Estate Planning Council of Cleveland, the Bay Village Education Foundation, the Bay Village Foundation, the LGBT Community Center of Greater Cleveland, the Cleveland Leadership Center, and as treasurer for the Cleveland Metropolitan Bar Association, Cleveland Metropolitan Bar Foundation, and Bay Soccer Club. She was the president for the Cleveland Metropolitan Bar Foundation. She is currently on the board for the National Association of Estate Planners and Councils and chairs the Accredited Estate Planner® Designation Committee. She has been a member of advisory groups for University Hospitals, the Cleveland Orchestra, and Case Western Reserve University. Additionally, she is an active fellow of the American College of Estate and Trust Council, and an Estate Planning, Trust and Probate Law Council member for the Ohio State Bar Association. Ginger is a frequent speaker on legal and tax issues surrounding charitable giving.

Ginger has been named among the Best Lawyers in America and the Top 50 Female Ohio Super Lawyers List by *Law and Politics* magazine. She was a member of the Leadership Cleveland Class of 2014. Ginger has received the Cleveland Metropolitan Bar Association's Women in Law Making a Difference and President's Awards, the Cleveland Metropolitan Bar Foundation's Outstanding Leadership Award, and the Estate Planning Council of Cleveland’s 2019 Distinguished Estate Planner Award. She graduated summa cum laude from The Ohio State University with a Bachelor of Science degree in business administration and earned her juris doctorate from The Ohio State University Moritz College of Law.

Recent or Upcoming Speeches

Boulder County EPC (CO)	EPC of Cleveland (OH)	Southern Arizona EPC (AZ)
Central Arizona EPC (AZ)	Fairbanks EPC (AK)	Spokane EPC (WA)
Charlotte EPC (FL)	Hampton Roads EPC (VA)	Toledo EPC (OH)
Central Pennsylvania EPC (PA)	Magic Valley EPC (ID)	Western Dakota EPC (ND)
EPC of Berks County (PA)	Sioux Falls EPC (SD)	

Susan P. Rounds, JD, CPA, LL.M. (taxation), AEP® V IP

Availability
Programs up to 3 hours
In-Person Programs Preferred (when travel is permitted by her employer), Virtual

Topics: Business Succession Planning – "Succession by Design – Successful Succession of the Family Business and Wealth"; Family Governance – "Family Dynamics & Intergenerational Conflict: Preserving Family Wealth and Harmony"; Collaboration – "High Performance Teaming & Professional Collaboration"

Susan Rounds is Head of Wealth Planning – Western Region for Deutsche Bank Wealth Management. She works with ultra-high net worth clients on matters of tax and estate planning, business succession, risk management, philanthropy, family governance and legacy. Her teaching experience includes the University of Georgia Law School, the Terry College of Business, the Becker CPA Review Course and the NYU Summer Institute on Taxation. Susan makes frequent presentations across the country and her articles have been featured in leading publications.

Recent or Upcoming Speeches through the No-charge Speaker Program

Birmingham EPC (AL)
Chester County EPC (PA)
Coeur d'Alene EPC (ID)
Colorado West EPC (CO)
Conejo Valley EPC (CA)
Elkhart County EPC (IN)
EPC of Colorado Springs (CO)
Fairbanks EPC (AK)
EP & Trust Council of Long Beach (CA)
EPC of the Emerald Coast (FL)
Eugene EPC (OR)
New Mexico EPC (NM)
New Orleans EPC (LA)
Northwest Washington EPC (WA)
Red River Valley EPC (ND)
Santa Clara County EPC (CA)
Seattle EPC (WA)
Siouxland EPC, Inc. (IA)
Suncoast EPC (FL)
T & EPC of Shreveport (LA)
Walla Walla Valley EPC (W

Estate planning councils affiliated with NAEPC have the special honor of nominating qualified individuals to apply for the Accredited Estate Planner® (AEP®) designation through the "AEP® Council Nomination Program?" A council's participation in this program affirms the multi-disciplinary approach to client service and the core value that brings all members of NAEPC together.

EXCELLENCE IN ESTATE PLANNING

Speaker and topic availability subject to change

Rachel L. Votto, CPA, AEP®

V IP

Availability
Programs up to 1 hour
Virtual or In-Person Programs (when travel is permitted by her employer)

Topics: Year-End Tax Planning, Overview of New Tax Laws

Rachel Votto is the Tax Partner-in-charge at BDG-CPAs. She has been with the firm for over 20 years and is partner-in-charge of all tax services. Rachel provides comprehensive financial planning to executives and high net worth individuals, including estate planning and working with income tax planning with trusts. She also serves many corporate and partnership clients including closely held businesses to multinational corporations with experience on acquisitions, reorganizations, international, multigenerational planning, multistate structures and complex tax planning strategies to assist clients in maximizing tax savings. She is a member and past president of the Estate Planning Council of Bergen County. She is currently a board member of Family Promise of Bergen County and the NAEPC. She has made various presentations on new tax legislation and other tax topics. Rachel graduated from Villanova University and also holds a Master's Degree in taxation from Pace University.

Recent or Upcoming Speeches through the No-charge Speaker Program

Conejo Valley EPC (CA)
El Paso EPC (TX)
EPC of Berks County (PA)
EPC of Central New York (NY)
EPC of Riverside County (CA)
EPC of Rochester (NY)
Quad City EPC (IA)
Roanoke Valley EPC (VA)

The NAEPC Journal of Estate & Tax Planning is available to all NAEPC members and provides cutting-edge estate planning-related content.

Speaker and topic availability subject to change

Eido M. Walny, Atty, AEP®, EPLS V IP

Availability:
In-Person Programs up to 1.5 hours (when feasible), Virtual Programs up to 1 hour

Eido's Favorite Topics Include: Top Ten Estate Planning Lessons from Celebrities; The Future of the Estate Planning Profession; Marketing in the Modern Era; Uses of ILITS and DILITS in Today's Tax Environment; Relevant Uses of Grantor Trusts

Eido M. Walny received his JD from the Boston University School of Law and his AB with honors from The University of Chicago. Eido founded the Walny Legal Group LLC, a boutique estate planning, elder law and family law firm, in 2011 with an eye towards providing clients with high level legal care, but an equally high level of customer service. He is a noted national speaker, author, and commentator on issues effecting estate planning, charitable giving methods, and topical business issue. Eido has been recognized for numerous awards, including being selected as a 2021 Best Lawyers in America, one of five national "Advisors with Heart" by *Trusts & Estates* magazine, being recognized as a "Leader in the Law" by the *Wisconsin Law Journal*, and being named as a Fellow to the Wisconsin Law Foundation's class of 2013.

In his spare time, Eido makes cufflinks, restores vintage cars, is President of his municipality's counsel, and is the father to a gifted hockey player and Olympic-track figure skater.

Recent or Upcoming Speeches through the No-charge Speaker Program

Anchorage EPC (AK)
Colorado West EPC (CO)
Conejo Valley EPC (CA)
Delaware EPC (DE)
EPC of Bergen County (NJ)
EPC of Chattanooga (TN)
EPC of Riverside County (CA)
EPC of Polk County (FL)
Santa Barbara EPC (CA)
Southern Arizona EPC (AZ)
EPC of the Lehigh Valley (PA)
Eugene EPC (OR)
Fox Valley EPC (WI)
Greater Middlesex/Somerset EPC (NJ)
Milwaukee EP Forum, Inc. (WI)
Montgomery EPC (AL)
Quad City EPC (IA)
San Antonio EPC (TX)
Waukesha County EPC (WI)
Western Dakota EPC (ND)

· How the Program Works

- One presentation or webinar per council is available (September 2021 – August 2022)
- Councils must adhere to the timing restrictions provided by the speaker.
- **Specific presentation dates are accepted at the time of application, but are not guaranteed. NAEPC will work with speaker to gauge his/her availability.**
- For live presentations, Council is responsible for speaker's travel and lodging expenses. These expenses may include, but are not limited to: transportation to and from the airport at the speaker's original location or airport parking charges; airfare and baggage charges; overnight accommodations to accommodate flight schedules and speaker preference (generally one or two nights); meals; and taxi, ride-share service, or rental car in the city of the council event.
- All expenses to produce the meeting (print, postage, food, audio-visual, continuing education, virtual delivery platform, etc.) are the sole responsibility of the Council. **Speaker will not be responsible for printing or shipping costs to prepare outlines, presentations, etc.**
- Council must allow speaker minimal time to offer a brief description of the programs and services available to members of the NAEPC and/or to distribute information.
- Council is welcome to invite speakers who are currently on the NAEPC board to attend a board meeting.
- Once awarded, Council agrees to notify the speaker and NAEPC immediately if plans change and the program will not be offered.
- Once awarded, it is the responsibility of the Council to handle all arrangements with the speaker / speaker's representative.
- All presentations will be awarded on a first come, first served basis.

After submitting the final page of this packet via email to eleanor@naepc.org, a representative from the NAEPC will email the council contact with availability for the speaker. If the speaker is available, the council will be supplied with contact information for the chosen presenter. The council should then reach out to the speaker to confirm date and time arrangements within two weeks of receipt, or sooner if indicated in the confirmation. Please call Eleanor M. Spuhler at the NAEPC office with any questions.

National Association of Estate Planners & Councils

1120 Chester Avenue, Ste. 470
Cleveland, OH 44114
866-226-2224
admin@naepc.org · www.NAEPC.org

Return this page to eleanor@naepc.org

· Speaker Request Form

Council Name____

Contact Name____

Contact Position within Council (indicate one): Staff Executive ☐ Officer ☐ Board Member ☐ Other ☐

Contact Phone____________________ Contact Email_______________________________________

· We would like take advantage of a webinar rather than an in-person presentation and prefer the following program (see page 6 for more information):____

Choice *(select at least one but not all, options recommended)*		**Presentation Date** *(options recommended)*	**Meeting Start and End Time & Time Zone**	**Presentation Length**	**Estimated Attendance**	**Preferred Delivery Method** *(virtual, live, or no preference)*
	Paul M. Caspersen					
	Al W. King, III					
	Lawrence J. Macklin					
	Kit Mac Nee					
	A. Stephen McDaniel					
	Ginger F. Mlakar					
	Susan P. Rounds					
	Rachel L. Votto					
	Eido M. Walny					

To whom shall we send NAEPC materials for distribution at in-person meetings? **No PO Boxes, please.*

Name____

Firm____

Address*____

City____ State_______ Zip Code____________

Speaker and topic availability subject to change