



**National Association of Estate Planners & Councils**  
 1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

## **National Speakers Bureau Information Package**

*A copy of all or a part of this information will be available on the NAEPC website, [www.naepc.org](http://www.naepc.org). Please type or print your responses and email this sheet to Eleanor M. Spuhler at [admin@naepc.org](mailto:admin@naepc.org). Please include "application for online speakers bureau" in the subject line.*

### **Personal Information**

Name: \_\_\_\_\_ Date Submitted: \_\_\_\_\_

Professional Designations (check all that apply):

Attorney \_\_\_\_, CPA \_\_\_\_, TO \_\_\_\_, CLU \_\_\_\_, CFP® \_\_\_\_, ChFC \_\_\_\_, AEP \_\_\_\_, Other: \_\_\_\_\_

Member of the following estate planning council(s): \_\_\_\_\_

Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

Name and contact information for the person who should be contacted at your office for questions or inquiries about potential speaking engagements: \_\_\_\_\_  
 \_\_\_\_\_

### **Speaking Information**

Please list your most significant speaking engagements in the last three years:

<b>Date</b>	<b>Sponsor</b>	<b>Topic</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Do you have presentation references that local EPCs can contact (list name, organization and phone number)? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



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List locations of the estate planning councils to whom you have spoken in the last three years:

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On average, how many times a year do you speak (to groups outside your own firm):

\_\_\_ within a fifty mile radius of your office ~ \_\_\_ more than fifty miles from your office

Have you written any (list the number): \_\_\_ articles \_\_\_ books

In what publications have you been quoted in the last five years (not as an author): \_\_\_\_\_

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Do your presentations generally include (check those that apply):

\_\_\_ a detailed outline \_\_\_ PowerPoint slides \_\_\_ Other: \_\_\_\_\_

What requirements do you have for speaking?

\_\_\_ LCD projector \_\_\_ lavalier microphone \_\_\_ overhead projector

\_\_\_ flip chart \_\_\_ Other (list): \_\_\_\_\_

Do you charge for speaking (over your coach-class travel, lodging and meal costs)? Yes \_\_\_ No \_\_\_

If yes, what is the range of fees? \_\_\_\_\_

List any other cost requirements (e.g., first class air): \_\_\_\_\_

Please provide information on your unique talents & background for speaking:

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**Topics for Presentations** - please check those that apply

**Tax Planning**

\_\_\_ State Income Taxes

\_\_\_ Federal Income Taxes

\_\_\_ Federal Transfer Taxes

\_\_\_ Generation Skipping Taxes

\_\_\_ State Transfer Taxes

\_\_\_ International Taxes

\_\_\_ Other Tax Issues:

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## Estate Planning

- \_\_\_ General Estate Planning
- \_\_\_ Current Update on Recent Estate Planning Changes
- \_\_\_ Trends in Estate Planning
- \_\_\_ Planning for Gifts (e.g., exemptions, annual exclusions, 529 Plans)
- \_\_\_ State Specific Estate Planning. List States: \_\_\_\_\_
- \_\_\_ Life Insurance in Estate Planning
- \_\_\_ Financial Decision Making in an Estate Plan
- \_\_\_ Planning for Retirement Plans, IRAs & Other Employee Benefits
- \_\_\_ Asset Protection Planning
- \_\_\_ Valuation Issues in Estate Planning
- \_\_\_ The Psychology of Planning
- \_\_\_ Partnerships, LLCs and Entity Planning
- \_\_\_ Planning for Divorce and/or Second Marriages
- \_\_\_ Planning for Resident Aliens and Non-Resident Aliens
- \_\_\_ Planning for Americans Living Overseas
- \_\_\_ Other: \_\_\_\_\_

## Trusts & Estates

- |                                 |  |
|---------------------------------|--|
| ___ Testamentary Trusts         | ___ Special Needs Trusts                           |
| ___ Revocable Trusts            | ___ Income Tax Planning for Estates and Trusts     |
| ___ Lifetime Irrevocable Trusts | ___ Avoiding Common Mistakes in Estates and Trusts |
| ___ Life Insurance Trusts       | ___ Choosing Fiduciaries                           |
| ___ Defective Trusts            | ___ Other: _____                                   |
| ___ Dynasty Trusts              | _____  |
| ___ S Corporation Trusts        | _____  |
| ___ Charitable Trusts           | _____  |
| ___ Incentive Trusts            | _____  |
| ___ Minor Trusts                | _____  |

## Charitable Planning

- \_\_\_ Using Charitable Trusts
- \_\_\_ Planning for Charitable Transfers
- \_\_\_ Private Foundations, Donor Advised Funds, Supporting Organizations, Endowments
- \_\_\_ Life Insurance in Charitable Planning
- \_\_\_ Other: \_\_\_\_\_

## Elder Law Issues

- \_\_\_ Entitlement Programs
- \_\_\_ Long Term Care
- \_\_\_ Incapacity Planning
- \_\_\_ Other: \_\_\_\_\_



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## Business Succession Issues

\_\_\_ Family Business Succession Planning

\_\_\_ Exit Planning

\_\_\_ Buy-Sell Agreements

\_\_\_ Other: \_\_\_\_\_

## Other Topics

\_\_\_ Speaking and Writing to Grow your Estate Planning Practice

\_\_\_ Effective Networking

\_\_\_ Working with other Professionals

\_\_\_ Other: \_\_\_\_\_

List the names of some of your most interesting presentations:

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### Requirements

To be listed in the NAEPC Speakers Bureau, you must agree not to promote any product or service. In addition, you must be a Distinguished Accredited Estate Planner (an award given by the NAEPC) *or* have spoken at least two times in the previous two calendar years and have worked as a professional for at least ten years.

\_\_\_\_\_ I am a Distinguished Accredited Estate Planner *or*

\_\_\_\_\_ I have spoken at least two times in the previous two calendar years (please list speeches above)

\_\_\_\_\_ I have worked as a professional for at least ten years (please attach a short biography)

### Attachments

Please attach written recommendations from:

- two affiliated local estate planning councils to whom have spoken in the previous two calendar years; or
- an approved national organization or event (e.g., Society of FSP, FPA, MDRT, ABA, AICPA, University of Miami Heckerling Institute on Estate Planning) to whose national meeting or annual event you have spoken to in the previous two calendar years; or
- confirmation of an approval rating of 85% or better in three estate planning or tax presentations made in the previous three calendar years in which least fifteen participants responded (please attach all the written reports).

*If there is a reason you believe these requirements should be waived for you, please attach a separate letter to the NAEPC's Professional Development & Education Committee explaining why you feel an exception should be granted.*

The undersigned speaker certifies that the foregoing information is correct and agrees to update such information when requested and no more than once per year. I agree not to promote any product or service when I make any presentation to an affiliated local estate planning council. I understand that submitting this information does not guarantee my being listed on the National Association of Estate Planners and Councils ("NAEPC") website and NAEPC may (in its sole and exclusive judgment), with or without cause, at any time not use or remove my name as a speaker or modify my listing. I agree to hold harmless and indemnify NAEPC, its affiliates, officers, directors, agents and employees from any claim, demand, expense or liability which may relate to or result from any presentation for which I have been engaged or the inaccuracy of any information contained herein.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name of Applicant