# NO-CHARGE SPEAKER PROGRAM

## LEARN FROM LEADERS IN THE ESTATE PLANNING COMMUNITY

The “No-Charge” speaker program is one of the most valuable benefits offered by NAEPC. The participants have agreed to speak (within noted guidelines) WITH THEIR HONORARIUM WAIVED! Each speaker will present an educational topic and speak to the benefits of being a member of NAEPC. All speakers in the program are either past presidents, current board members, long-time staff, or past board members of NAEPC. In addition, current NAEPC board members may 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, long-time staff, or past board members of NAEPC.

Councils **must** submit their request form to NAEPC rather than contacting speakers directly.

Please note that programs are not available during the week prior to and during the Annual Estate Planners Forum held in the spring, and may be limited near other in-person and virtual events, the time leading up to the conference, and during peak professional seasons.

ALL REQUESTS ARE BASED ON SPEAKER AVAILABILITY.

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

# Speakers:

**Monique Lavender Greenberg**
JD, LL.M, AEP®
Coral Gables, Florida
*current board of directors*

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

**Kit Mac Nee**
CFP®, CRPC®, AEP®
Los Angeles, California
*past board of directors*

**Lawrence (Larry) J. Macklin**
CPA, JD, AEP®
Baltimore, Maryland
*current executive committee*

**Bronwyn L. Martin**
PhD, MBA, ChFC®, CLU®, CLTC®,
CRPC®, CFS®, CMFC®, AEP®, LACP
Kennett Square, Pennsylvania
*current executive committee*

**Nimisha Patel**
CPA, CAA, MSAT, AEP®
Vernon Hills, Illinois
*current board member*

**Susan P. Rounds**
JD, CPA, LL.M. Taxation,
AEP® (Distinguished), TEP
Los Angeles, California
*past board of directors*

**Katherine (Katie) M. Sheehan**
JD, AEP®, ATFA
Boston, Massachusetts
*current board of directors*

**Eleanor M. Spuhler**
Cleveland, Ohio
Yulee, Florida
*staff*

**Rachel L. Votto**
CPA, AEP®
Ridgewood, New Jersey
*current executive committee*

**April D. Wise**
JD, AEP®
Montgomery, AL
*current executive committee*

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ESTATE PLANNERS & COUNCILS
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## Monique Lavender Greenberg, JD, LL.M, AEP®

Coral Gables, Florida

*current board of directors*

**Availability:**
**Programs up to 2 hours (dependent on Ms. Greenberg's schedule and the amount of notice)**
**Virtual or In-Person Programs**

**Topics:**

- **Major Repercussions, Minor Children: Estate Planning for Families with Minor Children**
- **Artful Estates: Estate Planning for Art Collectors**
- **Celebrity Estate Planning Gone Wrong**

Monique Lavender Greenberg is a Florida Board Certified Wills, Trusts, and Estates Attorney and a Florida Civil Circuit Court Mediator. She is the Managing Attorney at Lavender Greenberg PLLC in Coral Gables, FL. In this role, she focuses her practice on estate planning and probate law, advising families and individuals on the financial, legal, and tax aspects of their estate plans. Monique has both a JD and an LL.M. in Estate Planning from the University of Miami, and she has also been awarded the Accredited Estate Planner (AEP®) Designation from the National Association of Estate Planners & Councils.

Monique currently serves on the Board of Directors for the National Association of Estate Planners & Councils. She has been a member of the Greater Miami Estate Planning Council for several years and is a Past President of the Coral Gables Estate Planning Council. She also serves on the Board of Directors for the Coral Gables Bar Association and Beaux Arts Miami, and is a past board member of the Junior League of Miami. Additionally, she is a member of the Miami-Dade County Bar Association, UM Planned Giving Advisory Board, Florida Association of Women Lawyers, Florida Lawyers Network, and the Coral Gables Bar Association. Through her active involvement in legal organizations, Monique continues to shape and elevate the standards of estate planning and legal excellence.

**Monique has spoken at each of the following councils during her first year in the No-Charge Speaker Program:**

- EPC of Montgomery County (MD)
- EPC of Northwest Florida (FL)
- Fox Valley EPC (WI)

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

Westport, Connecticut
New York, New York
*past board of directors*

**Availability:**
**Programs up to 2 hours**
**Virtual Programs Preferred**

**Topics:**

- **Important Population Trends That Influence Powerful Trust Strategies - Inheritance is a Process not an event**
- **Preventing Family Trust Disputes**
- **Powerful Trust Laws to Protect Family Wealth and Combat Future Uncertainties: Taxes, Economy, Family, Divorce, Asset Protection**
- **Interesting Trends With Millennials & Trusts**
- **Directed Trusts, Private Family Trust Companies, and Other Powerful Trust Administration Structures**
- **Does Estate Tax Repeal Really Matter?**
- **Is a WealthTax in Our Future?**
- **Preserving Family Values by Encouraging Social and Fiscal Responsibility with Modern Trust Structures**

Al W. King, III is a frequent lecturer and author on modern trust planning and trust situs. He is the co-founder of South Dakota Trust Company LLC and its related companies, which was acquired by London based JTC in 2023. With more than $200 billion in assets under administration, South Dakota Trust Company offers pure trust administration without any products, 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 and 48 states. 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-Chairman of the Editorial Board of Trusts and Estates magazine and has been a member for more than 34 years. He is a member of several groups and organizations, including the Society of Trust and Estate Professionals (STEP), the International Trust and Planning Association (ITPA), and New York City Estate Planning Council.

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 has spoken to each of the following councils since joining the No-Charge Speaker Program in 2022:**

- Boston EPC (MA)
- Cincinnati EPC (OH)
- Colorado West EPC (CO)
- Corpus Christi EPC (TX)
- El Paso EPC (TX)
- EPC of Central New Jersey (NJ)
- EPC of Central New York (NY)
- EPC of Long Island, Inc. (NY)
- EPC of Rochester (NY)
- EPC of Westchester County (NY)
- Northcentral Pennsylvania EPC (PA)
- Rio Grande Valley EPC (TX)
- Sioux Falls EPC (SD)
- West River E&FP Council (SD)

## Kit Mac Nee, CFP®, CRPC®, AEP®

Los Angeles, California

*past board of directors*

**Availability:**
**Programs up to 2 hours**
**Virtual or In-Person Programs**

**Topics:**

- **Behavioral Finance: Is it rational or irrational**
- **Myths about Social Security: Understanding Benefits**
- **Protecting Yourself from Identity Theft**
- **Estate Planning for different cultures: What are the barriers**
- **The Myths of 529s: Transfer Millions out of an Estate?**
- **Socially Responsible Investing: Do my Investments Match my Values?**
- **Intelligent Withdrawals: Tax efficiency and Maximizing the Income you Keep**
- **Maximizing the Benefits of Charitable Giving Through Assets vs. Income**
- **Impact of Long Term Care and Health Expenses on Legacy Preservation**
- **Strategies to Preserve the Family Legacy: How do you talk with your family about money and values?**

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, a financial services veteran, joined Morgan Stanley as a Financial Advisor in Pasadena, CA in 2013 and is currently with the Envision Legacy Group in Beverly Hills, CA. 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. While at the community foundation 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 from coast to coast. 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 she served as 2024 President for NAEPC and as a board member of 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.

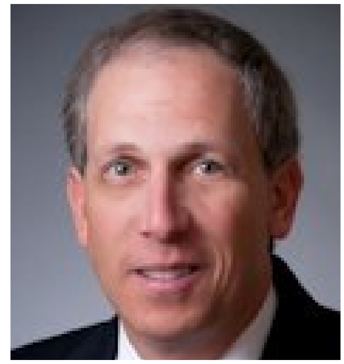
**Kit has spoken to each of the following councils over the past 5 years with the No-Charge Speaker Program, many more than once:**

- Amarillo Area EPC (TX)
- Central Arizona EPC (AZ)
- Central Pennsylvania EPC (PA)
- Corpus Christi EPC (TX)
- EPC of Arkansas (AR)
- EPC of Northwest Florida (FL)
- EPC of Rochester (NY)
- EPC of Tulare-Kings Counties (CA)
- EPC of Westchester County (NY)
- Great Lakes Bay EPC (MI)
- Howard County EPC (MD)
- Lynchburg EPC (VA)
- Magic Valley EPC (ID)
- Montgomery County EPC (PA)
- Rio Grande Valley EPC (TX)
- Roanoke Valley EPC (VA)
- Sacramento EPC (CA)
- Southern Arizona EPC (AZ)
- Spokane EPC (WA)
- Western Dakota EPC (ND)
- Western Michigan EPC (MI)
- Wichita EPC (KS)

## Larry J. Macklin, CPA, JD, AEP®

Baltimore, Maryland

*current executive committee*



**Availability:**
**Programs typically 1 hour but up to 3 hours**
**Virtual or In-Person Programs**

**Topics:**

- **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 (given at the Notre Dame Tax and Estate Planning Institute)**
- **Understanding Life Insurance**
- **Important Issues in Modern Trust Design**
- **Breaking the Myth About When to Claim Social Security Benefits**

**Councils are welcome to work with Mr. Macklin to choose a topic best suited to their program.**

Lawrence J. Macklin is a CPA, attorney, and an Accredited Estate Planner® (AEP®). Mr. Macklin began his tax and estate planning career in 1982, and for 30 years, he was a managing director and wealth strategist with the Bank of America Private Bank before he retired from the bank in 2024. He continues to work as a freelance consultant. 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.

**Larry has recently rejoined the No-Charge Speaker Program after taking a few years away to focus on his executive leadership role.**

**Bronwyn L. Martin, PhD, MBA, ChFC®, CLU®, CLTC®, CRPC®, CFS®, CMFC®, AEP®, LACP**
Kennet Square, Pennsylvania
*current executive committee*

**Availability:**
**Programs up to 1 hour including a Q&A**
**Virtual or In-Person Programs**

**Topics:**
- **Planning for Clients Living with Multiple Sclerosis (MS)**
- **Financial and Estate Planning for People with Alzheimer's Disease (AD)**
- **Chronic Illness as a Financial Risk: The Economic and Planning Impact of Alzheimer's and MS**

Bronwyn L. Martin is a nationally recognized speaker and multidisciplinary expert whose work bridges scientific research, financial strategy, and real-world decision-making for families and professionals. She holds a PhD in Biochemistry from Boston University School of Medicine, where her research produced peer-reviewed publications and international presentations on neurodegenerative mechanisms, and an MBA from West Chester University, where she is currently the Entrepreneur in Residence ('25-'27). Since 2000, Martin has led Martin's Financial Consulting Group, an Ameriprise Platinum Financial Services® practice, advising households, business owners, and multigenerational families on complex financial and estate-planning decisions. She is a frequent contributor to leading financial and estate planning publications, speaks regularly on planning for families affected by serious illness and cognitive decline, and is the author of *Your Amazing Itty Bitty Financial Wisdom Book: 15 Steps to Build, Preserve, and Protect Your Wealth*. A recipient of the Pennsylvania Best 50 Women in Business award, Martin is also an annual advocate with legislators on issues affecting families and individuals living with dementia; her perspective is shaped equally by deep technical expertise and lived experience, including her path to U.S. citizenship in 2006.

**Bronwyn is a new member of the No-Charge Speaker Program.**

**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

## Nimisha Patel, CPA, CAA, MSAT, AEP®
Vernon Hills, Illinois
*current board member*

**Availability:**
**Programs up to 2 hours**
**Virtual or In-Person Programs**

**Topics:**
- **Business, individual, and high-net-worth gift and estate tax planning under current law**
- **Restructuring, mergers, and acquisitions in conjunction with federal and state tax law**
- **Retirement planning and the SECURE Act**
- **Federal and state tax representation**
- **Overview of new tax laws and proactive planning for corporations, businesses, individuals, estates, and gifts**

Nimisha Patel, CPA, CAA, MSAT, AEP® is a founding member of Pinnacle Worldwide Inc., where she has served for over 23 years as the Executive Member-in-Charge of all tax and estate clientele. A passionate advocate for thoughtful and proactive tax and estate planning, Nimisha is known for translating complex, ever-changing tax laws into clear, actionable strategies tailored to each client's unique situation — from start-ups and mid-sized firms to large established corporations, their owners, partners, and executives, as well as high-net-worth individuals, multi-generational families, and family offices.

Before joining Pinnacle Worldwide, Nimisha built an exceptional foundation at Arthur Andersen, one of the Big Four accounting firms, where she rose to the senior level and was named equity partner in 1999. Earlier in her career, she served as Controller for a subsidiary of a publicly held corporation, as well as with several accounting and consulting firms.

Nimisha provides comprehensive tax and financial planning across a wide spectrum of clients, collaborating with senior management of firms, businesses, trusts, and family offices. She extends her expertise to bank trust institutions, multinational and international entities, and both privately and publicly held corporations in consultative and compliance capacities. She is particularly sought after for her work in Mergers & Acquisitions, developing pre- and post-transaction strategies to minimize tax exposure under current law. She has also successfully represented a multitude of clientele in both federal and state matters across numerous areas of taxation across all sectors, including cryptocurrencies.

Beyond her professional practice, Nimisha is deeply committed to philanthropy and humanitarian causes and has played an active role in establishing and shaping policies at both the county and national levels.

A recognized thought leader, Nimisha has presented widely on new tax legislation, estate planning, retirement planning, and the implications of landmark measures such as the SECURE Act. She served as President of the Lake County Estate Planning Council (LCEPC) and currently serves as its Immediate Past President. She is also a current Board Member of the National Association of Estate Planners & Councils (NAEPC) and a current Executive Board Member of the LCEPC.

Nimisha holds multiple bachelor's degrees, a master's degree, and her CPA designation from the University of Illinois, along with numerous certifications relevant to her areas of expertise.

**Nimisha  is a new member of the No-Charge Speaker Program.**

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

**Availability:**
**Programs up to 3 hours**
**In-Person Programs**

**Topics:**

- **Transition by Design – Successful Succession of the Family Business and Wealth**
- **Family Dynamics and Intergenerational Conflict: Family Governance as a Tool for Preserving Family Wealth and Harmony**
- **High Performance Teaming & Professional Collaboration**

Susan Rounds works with ultra high net-worth clients and their families on matters of tax and estate planning, business succession, risk management, philanthropy, family governance and legacy. Teaching highlights include the University of Georgia School of Law and 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. Susan was inducted into the NAEPC Estate Planning Hall of Fame in November 2022. Professional designations include JD, CPA, LLM, TEP, AEP® (Distinguished) .

**Susan has spoken to each of the following councils over her past five years with the No-Charge Speaker Program, many more than once:**

- Baltimore EPC (MD)
- California Central Coast EPC (CA)
- Central Arizona EPC (AZ)
- Charlotte EPC (NC)
- Colorado West EPC (CO)
- Eastern Idaho EPC (ID)
- EPC of Eastern New York (NY)
- EPC of Mobile (AL)
- EPC of Northeast Wisconsin, Inc. (WI)
- EPC of Rochester (NY)
- F&EPC of Metropolitan Detroit, Inc. (MI)
- Great Lakes Bay EPC (MI)
- Gulf Coast EPC, Inc. (FL)
- Howard County EPC (MD)
- Magic Valley EPC (ID)
- Northcentral Pennsylvania EPC (PA)
- Palm Beach County EPC (FL)
- Redwood Empire EPC (CA)
- Sacramento EPC (CA)
- Siouxland EPC, Inc. (IA)
- Stanislaus County EPC (CA)
- Tampa Bay EPC (FL)
- Toledo EPC (OH)
- West River E&FP Council (SD)
- Western Dakota EPC (ND)

**Katherine (Katie) M. Sheehan, JD, AEP®, ATFA**
Boston, Massachusetts
*current board of directors*

**Availability:**
**Programs up to 2 hours**
**Virtual or In-Person Programs**

**Topics:**

- **Put the Success in Business Succession Planning**
- **Stop Talking and Start Planning, Getting your Clients to Plan**
- **Planning for Loved Ones with Special Circumstances**
- **Choosing the Right Fiduciary**
- **Fundamentals of Transfer Tax**

Katie is a Managing Director and Wealth Strategist at Crestwood Advisors, LLC, based in the firm's Boston office. Prior to joining Crestwood, she served as a Wealth Strategist at SVB (formerly Boston Private).

Earlier in her career, Katie was a Partner at DesRosiers, Tierney & Sheehan, LLC, and practiced at Cody & Cody, LLC and Ruberto, Israel & Weiner. Her private practice focused on estate planning, estate and trust administration, charitable planning, long-term care planning, and elder law. She also previously served as Trust Counsel for Boston Financial Management.

Katie earned her B.A., magna cum laude, from Boston College (1998) and her JD, magna cum laude, from Suffolk University Law School (2003). While in law school, she worked as a research assistant to Professor Charles E. Rounds, Jr., contributing to the 2002 edition of Loring: A Trustee's Handbook.

Katie is a frequent speaker on estate and tax planning topics and has been quoted and published in national publications. She serves as Co-Editor-in-Chief of the NAEPC Journal of Estate and Tax Planning and is a regular faculty member for Massachusetts Continuing Legal Education (MCLE). She is president-elect of the Boston Estate Planning Council (BEPC) and serves on the board of the National Association of Estate Planning Councils (NAEPC). Katie is licensed to practice law in Massachusetts.

Katie lives in Duxbury, Massachusetts, with her husband and three children.

**Katie has spoken at each of the following councils over her first year in the No-Charge Speaker Program:**

- EPC of Northwest Florida (FL)
- Western Michigan EPC (MI)
- EPC of Eastern New York (NY)
- Charlotte EPC (NC)
- Great Lakes Bay EPC (MI)
- Hampton Roads EPC (VA)

**Eleanor M. Spuhler**
Cleveland, Ohio
Yulee, Florida
*staff*

**Availability:**
**Programs up to 30 minutes**
**Virtual (a select number of in-person programs will be available pending NAEPC board approval)**

**Topic:**

- **A Glimpse Inside NAEPC: the Association's Past, Present, and Future**

**This session provides an overview of NAEPC and is intended to supplement a council's technical programming. It is best suited for a less formal event or as an add-on to a regular educational event.**

**"As a member of your Estate Planning Council, you are part of a large national network of estate planning professionals through the council's membership in the National Association of Estate Planners & Councils. This session will provide an understanding of the relationship between NAEPC and your Estate Planning Council, ensure you are well-versed in the benefits provided by this affiliation, and will help you make the most of your membership experience."**

Eleanor M. Spuhler serves as executive manager of the National Association of Estate Planners & Councils, having supported the association and its councils for nearly 25 years. She also served as administrator of the Estate Planning Council of Cleveland from 2001 through 2017. Prior to her role with NAEPC, she worked in the hospitality industry and is a culinary school graduate.

**Eleanor is a new member of the No-Charge Speaker Program.**

**Rachel L. Votto, CPA, AEP®**
**Ridgewood, New Jersey**
***current executive committee***

**Availability:**
**Programs up to 1 hour**
**Virtual or In-Person Programs**

**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.

**Rachel has spoken to each of the following councils over her past five years with the No-Charge Speaker Program, many more than once:**

- EPC of Riverside County (CA)
- Roanoke Valley EPC (VA)
- EPC of Central New York (NY)
- EPC of Berks County (PA)
- Greater Huntington EPC (WV)
- Howard County EPC (MD)
- El Paso EPC (TX)
- Corpus Christi EPC (TX)
- EPC of Westchester County (NY)
- EPC of Arkansas (AR)
- Mercer County EPC (NJ)
- New Hanover County EPC (NC)
- EPC of Rhode Island (RI)
- Colorado West EPC (CO)
- Central Pennsylvania EPC (PA)
- Central Arizona EPC (AZ)
- Northwest Montana EPC (MT)
- Southern Arizona EPC (AZ)
- Northcentral Pennsylvania EPC (PA)
- North Central Florida EPC (FL)

**April Wise, JD, AEP®**

Mongomery, Alabama

*current executive committee*

**Availability:**
**Programs up to 1.5 hours**
**Virtual or In-Person Programs**

**Topics:**

- **Special Needs Planning Tools**
- **Dealing with Broken or Problem Trusts**
- **What Does it Mean to Serve as a Fiduciary? Corporations as Fiduciaries**
- **Is it Worth It? Should we Take the Business? Best Practices for Trust Intake**

April Wise is attorney with Balch & Bingham, LLP who practices in the area of estate and tax planning, estate and trust administration, and special needs planning and settlement planning. April also handles other probate court matters including guardianships, conservatorships, and adoptions. In coordination with her estate planning practice, she assists business owners with corporate and business matters as well. April received her bachelor's degree in accounting, cum laude, from Auburn University in 2004 and her juris doctor, magna cum laude, from Cumberland School of Law in 2008. She is a designated Accredited Estate Planner® by the National Association of Estate Planners & Councils. In addition to the practice of law, April has served as an adjunct professor at Auburn University Montgomery where she taught estate planning to upper-level undergraduate students and graduate students. April actively serves in her local Rotary Club, Estate Planning Councils, church, and community foundation, including serving as a National Board Member of the National Association of Estate Planners & Councils.

**April is a new member of the No-Charge Speaker Program**.

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# YEARLY NO-CHARGE SPEAKER PROGRAM

## LEARN FROM LEADERS IN THE ESTATE PLANNING COMMUNITY

**How the Program Works**

- One presentation per council is available (September 2026 – August 2027)
- 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/their availability.
- For live presentations, the 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.

After submitting the final page of this packet via email to councilservices@NAEPC.org, a representative from the NAEPC will email the council contact a confirmation that includes 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 Sarah Pierce at the NAEPC office with any questions: 866-226-2224 ext. 2.

**Please Return the Completed Form to Sarah Pierce: councilservices@NAEPC.org**

National Association of Estate Planners & Councils
2001 Crocker Rd., Ste. 510, Westlake, OH 44145

## Speaker Request Form

Council Name: ______________________________________________

Contact Name: ______________________________________________

Contact Position within Council (circle one):

Staff Executive     Officer     Board Member     Other: _______________

Contact Phone: ______________________________________________

Contact Email: ______________________________________________

Presentation Date (2-3 options recommended): ______________________

Meeting Start and End Time & Time Zone: __________________________

Presentation Length Estimated: _________________________________

Preferred Delivery Method (virtual, live, or no preference): ______________

Choice (indicate at least one but not all, 2-3 options recommended):

___ Monique Lavender Greenberg

___ Al W. King, III

___ Kit Mac Nee

___ Lawrence (Larry) J. Macklin

___ Bronwyn L. Martin

___ Nimisha Patel

___ Susan P. Rounds

___ Katherine (Katie) M. Sheehan

___ Eleanor M. Spuhler

___ Rachel L. Votto

___ April D. Wise

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