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1120 Chester Ave., Ste. 470
Cleveland, OH 44114

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**NEW SCHEDULE**

# 55th Annual NAEPC
## Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders

EDUCATION • COLLABORATION

**November 6-9, 2018**
**Fort Lauderdale, FL**

**Marriott Harbor Beach Resort & Spa**

*Brought to you by the National Association of Estate Planners & Councils*

# 55th Annual Advanced Estate Planning Strategies Conference General Information

### Registration Fees

| | |
|---|---|
| Conference with Pre-Conference Sessions for Council Leaders | $1,175 |
| Conference Technical Education Sessions | |
| Member * | $1,075 |
| Non-Member | $1,300 |
| Companion Program & Tours | $475 |
| Late Registration Fee (on or after 10/19/18) | $50 |

*Active AEP® or EPLS or member of an affiliated estate planning council

### Discounts

| | |
|---|---|
| Early Bird (on or before 09/14/18) | $50 |
| Active AEP® or EPLS | $50 |
| Florida Council Member | $50 |
| NAEPC Volunteer | $100 |

### Cancellation

A full refund will be granted for cancellations emailed to conference@naepc.org on or before 09/14/18. Registrants who cancel between 09/15/18 and 10/19/18 will forfeit a $100 administrative fee. No refunds will be granted after 10/19/18.

NAEPC
1120 Chester Ave., Ste. 470 – Cleveland, OH 44114
866-226-2224 – www.naepc.org/conference

### How to Register

Register at www.naepc.org/conference or contact the NAEPC office for a copy of the conference registration form.

### Headquarters Hotel & Lodging

The conference will be held at Marriott Harbor Beach Resort & Spa in Ft. Lauderdale, Florida. The NAEPC room rate is $245 for a standard room with an optional Resort Amenity Package of $25/night. Reserve by 10/21/18 by calling 954-525-4000 and referencing group code “NAEPC” or online at www.naepc.org/conference.

### Continuing Education Credit

Continuing education credit will be available nationwide for estate planning-related disciplines to those who attend the Wednesday, Thursday, and Friday technical education sessions (pending approval). **Life insurance professionals must attend all technical education sessions on Wednesday, Thursday, and Friday to receive credit; partial credit is not available.** For complete details and approval status, visit www.naepc.org/conference.

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## Pre-Conference Sessions for Estate Planning Council Leaders & Executives

## Tuesday, November 6, 2018 – Schedule of Events

| | |
|---|---|
| **7:30 am - 8:30 am** | Breakfast (**Leader** / **Executive** Track) |
| **8:30 am - 9:10 am** | Learning Pod #1 (**Leader** / **Executive** Track) |
| **9:15 am - 9:55 am** | Learning Pod #2 (**Leader** Track) |
| **9:15 am - 10:50 am** | Private Session with the NAEPC Webmaster (**Executive** Track) |
| **9:55 am - 10:15 am** | Conversation Break |
| **10:15 am - 10:50 am** | Learning Pod #3 (**Leader** Track) |
| **11:00 am - 12:45 pm** | NAEPC Annual Meeting, Luncheon & Presentation of Council of Excellence Awards (**Leader** / **Executive** Track) |
| **12:50 pm - 1:30 pm** | Learning Pod #4 (**Leader** / **Executive** Track) |
| **1:35 pm - 2:15 pm** | Learning Pod #5 (**Leader** / **Executive** Track) |
| **2:15 pm - 2:45 pm** | Conversation Break |
| **2:45 pm - 3:45 pm** | Council by Size Sharing Session (**Leader** / **Executive** Track) |
| **3:45 pm - 4:00 pm** | Conversation Break |
| **4:00 pm - 5:00 pm** | Council by Size Sharing Session Resumes (**Leader** / **Executive** Track) |
| **5:00 pm - 6:00 pm** | Opening Reception for All Attendees & Registered Companions (**Leader** / **Executive** Track) |
| **6:00 pm** | Private Council Executive Dinner (**Executive** Track) |

Council Leadership Day is a learning and sharing experience for volunteer leaders and staff of councils from across the country. The day offers separate tracks for leaders and executives (paid staff) and has been redesigned to offer more two-way conversations and time to speak to other leaders, along with shorter and more focused “Learning Pods,” sessions that address hot topics and new ideas.

Crafting Exciting Events with Broad Appeal

Negotiating with Venues, Vendors & Service Providers

Best Practices in Welcoming New Members

Creating a Member Milestone Program & Service/ Achievement Awards

Becoming a Council of Excellence

Creating a Sponsorship Program / Increasing Non-Dues Revenue

NAEPC Benefits and Resources Review

Operations Checklist

Usage of the Accredited Estate Planner® Designation Council Nomination Program

Dipping a Toe into Social Media, What's Right for Your Council?

Making the Most of your Council's NAEPC-Hosted Website

NAEPC-Hosted Website Platform: “About Us” to “Contact Us”

Navigating the National Website

A Purposeful Discussion on the 2018 US Trust Study of High Net Worth Philanthropy - a Collaboration between U.S. Trust and the Indiana University Lilly Family School of Philanthropy

Potpourri of Concepts and New Ideas

Visit Our Website

Visit www.naepc.org/conference for a detailed description of each Learning Pod.

**Sessions for executives continue through noon on Wednesday, November 7, 2018 - please travel plans accordingly. Council executives are always eligible to attend the conference with the registration fee waived.**

# 55th Annual Advanced Estate Planning Strategies Conference Schedule of Events

## Tuesday, November 6, 2018

**4:45 pm - 5:15 pm**
Companion Registrant Meet & Greet

**5:00 pm - 6:00 pm**
Opening Reception with Exhibitors for All Conference Attendees and Registered Companions

## Wednesday, November 7, 2018

**5:45 am**
2-Mile Fun Run & Walk (all fitness levels welcome, pre-registration requested)

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

**7:00 am - 7:45 am**
**Concurrent Sponsor Bonus Sessions**

**Life Settlements - The Value Proposition**
Matthew Sheridan
*provided by Berkshire Settlements, Inc.*

**From Novelty to Necessity - Pragmatic Social Media for Law Firms**
Sean Sands
*provided by FindLaw, part of Thomson Reuters*

**8:00 am - 8:30 am**
Welcome & Opening Remarks

**8:30 am - 9:30 am**
**199A for Trusts and Estates**
Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA
Keebler & Associates, LLP

### Companion Program & Tours

The companion program is offered as an accompaniment to the annual conference for those who will be attending with a registrant, but will not be taking advantage of the educational sessions. The registration fee includes the conference receptions and breakfast on the day of each tour, the outings, and the friendship! **Companion Package $475**

Visit www.naepc.org/conference for a detailed description of each tour.

**Wednesday**
**November 7, 2018**
**Florida Everglades**
**9:00 am - 1:30 pm**


**Thursday**
**November 8, 2018**
**Art on Las Olas**
**9:30 am - 2:30 pm**


**8:30 am - 12:00 pm**
**Council Executive Development Session**
(Executive Track)

**9:30 am - 10:30 am**
**New Effective Uses of Non-Grantor Trusts for Individual Taxpayers**
Jonathan G. Blattmachr, Esq., AEP® (Distinguished)
Pioneer Wealth Partners, LLC

**10:30 am - 11:00 am**
Break with Exhibitors

**11:00 am - 12:00 pm**
**Collaborative Planning Opportunities Created through the Valuation of Life Insurance**
Lisa R. Featherngill, CFP®, Todd A. Fithian, Todd S. Healy, MSW, CLU®, ChFC®, AEP®, CAP®, Jamie L. Mendelsohn, and Jon B. Mendelsohn
*session provided by Ashar Group, LLC*

**12:00 pm - 1:30 pm**
Lunch with Exhibitors

**1:30 pm - 2:30 pm**
**The Social Media Thicket: Social Media Issues for Estate Planners**
Michael H. Rubin, JD
McGlinchey Stafford

**2:30 pm - 3:30 pm**
**Stupid Charitable Tricks and Common Planning Mistakes**
Ramsay H. Slugg, JD
U.S. Trust Bank of America Private Wealth Management

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

**4:00 pm - 5:00 pm**
**Succession Planning for the Closely-Held Business**
Jerome M. Hesch, MBA, JD, AEP® (Distinguished)

**5:00 pm - 6:30 pm**
Reception with Exhibitors for All Conference Attendees and Registered Companions

***Recognizing Excellence in Estate Planning & Service to the Profession***

**2018 Estate Planning Hall of Fame® Entrants**
Hartman Axley, CLU®, ChFC®, JD, CFP®, MSFS, RHU
Amy Morris Hess, JD
Stephanie Loomis-Price, JD
Charles A. Redd, JD
A. Charles Schultz, JD

**2018 Hartman Axley Lifetime Service Award Recipient**
S. Stacy Eastland, JD, AEP® (Distinguished)

*Join us for the recognition ceremonies on*
**Thursday, November 8, 2018**

## Thursday, November 8, 2018

### 6:30 am - 7:45 am
Breakfast with Exhibitors

### 7:00 am - 7:45 am
**Concurrent Sponsor Bonus Sessions**

**Why the Bridge Trust® is Superior to a Foreign-Only or Domestic-Only Asset Protection Trust**
Douglass Lodmell, JD, LL.M.
*provided by Lodmell & Lodmell, P.C. / Asset Protection Council®*

**Sold a Dream, Woke Up in a Nightmare: Educating Your Clients about a Timeshare's True Costs**
Chuck McDowell
*provided by Wesley Financial Group, LLC*

### 7:50 am - 8:15 am
Opening Remarks

### 8:15 am - 8:30 am
**Presentation of Hartman Axley Lifetime Service Award**

### 8:30 am - 9:30 am
**Income Tax Aspects of Trusts and Estates**
Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)
Georgia State University College of Law

### 9:30 am - 10:00 am
**Estate Planning Hall of Fame® Induction Ceremony**

### 10:00 am - 10:30 am
Break with Exhibitors

### 10:30 am - 11:30 am
**How Courts Unravel Asset Protection Trust Strategies & Protecting Your Trust**
Louis S. Harrison, JD
Harrison & Held, LLP

### 11:35 am - 12:35 pm
**Concurrent Breakout Sessions (pre-registration requested)**

**Reading, Interpreting and Drafting Trust Distribution Provisions that Work: Say What You Mean and Mean What You Say**
Leslie Kiefer Amann, JD, AEP®, TO
Sentinel Trust Company LBA

**A Firearm as a Special Asset: How to Avoid an Accidental Felony**
C. Dennis Brislawn, Jr., JD, AEP®
Oseran Hahn, P.S.

**Late Elections Under Section 9100: How Does the IRS Spell Relief?**
Beth Shapiro Kaufman, JD
Caplin & Drysdale

**56th Annual NAEPC Advanced Estate Planning Strategies Conference**

**November 5-8, 2019**
**Las Vegas, Nevada**
**The Cosmopolitan of Las Vegas**


### 12:35 pm - 1:35 pm
Lunch with Exhibitors

### 1:35 pm - 2:35 pm
**Concurrent Breakout Sessions (pre-registration requested)**

**Reading, Interpreting and Drafting Trust Distribution Provisions that Work: Say What You Mean and Mean What You Say**
Leslie Kiefer Amann, JD, AEP®, TO
Sentinel Trust Company LBA

**A Firearm as a Special Asset: How to Avoid an Accidental Felony**
C. Dennis Brislawn, Jr., JD, AEP®
Oseran Hahn, P.S.

**Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy**
Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®
BNY Mellon

### 2:35 pm - 3:05 pm
Break with Exhibitors

### 3:05 pm - 4:05 pm
**Exploiting the 2017 Tax Act: Creative New Federal and State Income Tax Savings Opportunities**
Steven J. Oshins, JD, AEP® (Distinguished)
Oshins & Associates, LLC

### 4:15 pm - 5:15 pm
**Supplemental Concurrent Sessions (pre-registration requested)**

**Accredited Estate Planner® Designation from A-Z**
This session offers an overview of the AEP® designation program and requirements and provides the perfect opportunity to have your questions answered by the experts at NAEPC.

**Inspirational Session for Active Accredited Estate Planner® Designees and Estate Planning Law Specialist Certificants**
The Strength to Be Unstoppable – Lessons in Working Together from Roseann Sdoia, Boston Marathon Bombing Survivor

**Getting Started on the Path to Attorney Specialization with the Estate Planning Law Specialist Certification**
This session is available to actively licensed attorneys who wish to learn more about the Estate Planning Law Specialist certification program.

## Friday, November 9, 2018

### 7:30 am - 8:30 am
Breakfast

### 8:30 am - 8:45 am
Opening Remarks

### 8:45 am - 9:50 am
**Estate Planning Current Developments and Hot Topics**
Steve R. Akers, JD, AEP® (Distinguished)
Bessemer Trust Company, N.A.

### 9:50 am - 10:55 am
**Putting It On & Taking It Off: Managing Tax Basis Today (For Tomorrow)**
Paul S. Lee, JD, LL.M. (taxation), AEP® (Distinguished)
Northern Trust

### 10:55 am - 11:10 am
Break

### 11:10 am - 12:10 pm
**Don't Worry Retire Happy: Seven Steps to Retirement Security**
Tom Hegna, CLU®, ChFC®, CASL®

### 12:10 pm - 12:15 pm
Closing Remarks