



# 53<sup>rd</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

with Pre-Conference Sessions for Council Leaders

· EDUCATION · COLLABORATION

November 16 - 18, 2016

Litchfield Park, Arizona (Phoenix/Scottsdale) · The Wigwam

## Pre-Conference · Council Leader Day November 16, 2016

Sessions begin at 7:00 am

Council Leader Day offers a learning and sharing experience for volunteer leaders and staff of estate planning councils from across the country. The morning includes an abbreviated Annual Meeting, the Council of Excellence Awards presentation, and a very special session, "Understanding and Embracing Your Role as a Nonprofit Leader." Meetings with the webmaster will also be available.

The entire afternoon is devoted to private, volunteer-led discussion groups for leaders from councils of like-size.

Council Leader Day concludes with the conference welcome reception for all registered attendees & companions.

### Estate Planning Hall of Fame®

· 2016 ENTRANTS ·

Dave L. Cornfeld, JD

Jeffrey Schoenblum, JD

Diana S.C. Zeydel, JD, LL.M.

*Please join us in congratulating those who will be receiving the Distinguished AEP® designation at a very special ceremony on Friday morning.*

Please note, companion programs and schedule subject to change.

## Annual Conference, Day I November 17, 2016



8<sup>th</sup> Annual 2-Mile  
Fun Run & Walk

*The Critical Importance of High Investment Returns and Tax Free Compounding, and How to Achieve Them*  
Jonathan G. Blattmachr, Esq.,  
AEP® (Distinguished)

*Ten Charitable Planning Ideas for the Current Environment*  
Kathryn W. Miree

*The Mathematics of Estate Planning*  
Robert S. Keebler, CPA, MST,  
AEP® (Distinguished)

*Collaboration Across Small and Great Divides: Teamwork, Tensions, and Client-Center Solutions*  
Nancy B. Rapoport, JD

*Privileges/Valuation - Exploring Privileges in the Context of Hiring Appraisers*  
Stephanie Loomis-Price, JD

*What Can We Learn from the Estates of Deceased Celebrities?*  
John J. Scroggin, JD, LL.M., AEP®

**Exclusive Session for Active AEP® Designees, 5:15 pm – 6:15 pm**  
Fearless Public Speaking for Estate Planners, a Dialogue with Conrad Teittel, LL.B., LL.M., AEP® (Distinguished)

**Companion Tour**  
9:00 am – 3:00 pm

## Annual Conference, Day II November 18, 2016

*Annual Tax Update*  
Samuel A. Donaldson, JD, LL.M.,  
AEP® (Distinguished)

Annual Awards Ceremony & Estate Planning Hall of Fame® Induction Ceremony

*An Interview on the Nature and Practice of Our Profession and its Capacity to Meet the Challenges of the "Shirt Sleeves" Proverb*  
James E. Hughes, JD

*The Governing Law Clause in Trusts - Not Just Boilerplate Anymore*  
Jeffrey Schoenblum, JD,  
AEP® (Distinguished) Nominee

*Family and Multi-Disciplinary Team Dynamics for High Performance Family Wealth and Business Succession Planning*  
Kathy K. Wiseman

Sponsored Breakout Sessions

*Loan Regime Split-Dollar for Both Single and Joint Lives*  
Michael Amoia, JD, LL.M., CFP®,  
CLU®, ChFC®

**Companion Tour**  
9:00 am – 3:00 pm

TRUSTS & ESTATES

Yourefolio

HeirSearch.com  
A Division of International Genealogical Search, Inc.  
We Find Missing Heirs A Better Way®

LESLIE HINDMAN AUCTIONEERS  
CHICAGO | DENVER | MILWAUKEE | NAPLES | PALM BEACH | ST. LOUIS

SOUTH DAKOTA  
TRUST COMPANY LLC

Conference  
SPONSORS



**Lodging Information ·**

The conference will take place at The Wigwam. Originally built in 1918 as a gathering place for the Ohio-based executives of Goodyear Tire & Rubber, this Phoenix resort has maintained a reputation as one of the Southwest's landmark resort destinations. The NAEPC room rate is \$179 (single or double occupancy plus applicable taxes) plus a \$6/night resort fee. The resort fee includes in-room internet, access to the fitness center, and overnight self-parking, among other amenities.

Overnight accommodations can be made by calling (800) 327-0396 and letting the reservationist know you are with NAEPC or by booking online at [www.naepc.org/conference](http://www.naepc.org/conference). Reservations must be made by 10/21/16.

**Cancellation Policy ·**

Any cancellation must be received in writing or via email to [conference@naepc.org](mailto:conference@naepc.org). A full refund will be granted if notice is received on or before 09/30/16. Registrants who cancel between 10/01/16 and 10/31/16 will forfeit a \$100 administrative fee. No refunds will be granted on or after 11/01/16. Requests to transfer a registration will be accommodated.

**Continuing Education Credit ·**

Continuing education credit will be available nationwide for estate planning-related disciplines to those who attend the Thursday & Friday technical education sessions (*pending approval by governing bodies*). **Life insurance professionals must attend the entire conference to receive credit as partial credit is not available.**

**Registrant Discounts ·**

- \$50 Early Bird Discount (registration must be received by 09/30/16)
- \$50 Active AEP® or EPLS designee
- \$50 Host Council Discount for Members of all Arizona EPCs
- \$100 NAEPC Volunteer Discount (available to non-board members of any committee of NAEPC)

Last Name	First Name & Middle Initial
Professional Designations	Nickname for Nametag Purposes
Company Name	Street Address
City, State & Zip	Telephone Number
Email Address	Fax Number
Affiliated Local Council Membership	
Companion Last Name, First Name, and Nickname for Nametag Purposes	
Companion Street Address, City, State & Zip Code	
Companion Telephone Number	Companion Email Address

**Annual Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders · \$975**  
*The registration fee includes Council Leader Day sessions and technical education sessions, presentation material, conference breakfasts & luncheons & the Wednesday evening welcome reception. Council Administrators (paid staff) are eligible to attend the Council Leader Day Sessions at no charge.*

- I will attend the welcome reception on Wednesday, November 16, 2016
- I will participate in the fun run on Thursday, November 17, 2016 at 5:45 am
- I am an active AEP® and will participate in the private session on Thursday, November 17, 2016
- I have read and understand both the continuing education credit and cancellation policies (left panel)

**Annual Advanced Estate Planning Strategies Conference · \$875 (member\*) \$1,100 (non-member)**  
*The registration fee includes the Wednesday evening welcome reception, technical education sessions, presentation material & conference breakfasts & luncheons.*

- I will attend the welcome reception on Wednesday, November 16, 2016
- I will participate in the fun run on Thursday, November 17, 2016 at 5:45 am
- I am an active AEP® and will participate in the private session on Thursday, November 17, 2016
- I have read and understand both the continuing education credit and cancellation policies (left panel)

**Companion Registration Package · \$475**  
*The companion program is offered as an accompaniment to the annual conference for those who will be attending with a regular registrant, but will not be taking advantage of the educational sessions. The registration fee includes conference breakfasts, the Thursday & Friday tours & Wednesday welcome reception.*

- I will attend the welcome reception on Wednesday, November 16, 2016
- I will participate in the fun run on Thursday, November 17, 2016 at 5:45 am
- I will attend the companion tour on Thursday, November 17, 2016
- I will attend the companion tour on Friday, November 18, 2016

**Fee Computation & Payment**

Primary Registrant Fee	_____	
Less discount(s) - see left panel	_____	
Companion Registrant Fee	_____	
Subtotal	_____	
Add \$50 late fee if postmarked on or after 10/31/16 - TOTAL	_____	

*\*A member is defined as an active Accredited Estate Planner® designee, Estate Planning Law Specialist designee, or member of an estate planning council affiliated with NAEPC.*

Make check payable to "The NAEPC Education Foundation" and mail to address at the top of the page, register online at [www.naepc.org](http://www.naepc.org), or fax this page with credit card information to (216) 696-2582.

Account Number	Exp. Date
Signature	

**Additional information is available at [www.NAEPC.org/conference](http://www.NAEPC.org/conference).**