

Now Offering More Social and Networking Time!



56th Annual NAEPC
Advanced Estate Planning Strategies Conference
with Pre-Conference Sessions for Council Leaders
November 5 - 8, 2019 · Las Vegas, Nevada

Tuesday, November 5th
Pre-Conference Sessions for Council Leaders

Council volunteer leaders and staff executives* should attend the entire day of activities

7:00 am Leader Breakfast

8:00 am Learning Pods
Learning pods are small group workshops where council leaders can share their experience and learn from one another, all based on a single subject

8:50 am Private Council Executive Session with NAEPCs Webmaster

10:45 am NAEPC Annual Meeting, Awards Ceremony & Leader Luncheon

12:30 pm Learning Pods Resume

2:45 pm Council by Size Sessions

5:00 pm Opening Reception for all Conference Attendees & Registered Companions

6:00 pm Private Council Executive Dinner

***Special Note for Council Executives:**

Your sessions continue through 12:00 pm on Wednesday, November 6th – please make travel plans accordingly. Council Executives are eligible to attend the conference with the registration fee waived.



Wednesday, November 6th
Technical Education

5:45 am 11th Annual 2-Mile Fun Run & Walk

7:00 am Bonus Session
Small Business Gifts to CRTs and DAFs
Gregory W. Baker, JD, ChFC®, CFP®, CAP® provided by RenPSG

Estate Planning Tips and Nuggets
Martin M. Shenkman, CPA, PFS, MBA, JD, AEP® (Distinguished)

Life Settlement Legal and Ethical Responsibility
Jon B. Mendelsohn, Jamie L. Mendelsohn & Jason T. Mendelsohn provided by Ashar Group, LLC

Traps for the Unwary – Some Estate Planners' Proscriptions and Conundrums
Richard A. Oshins, JD, LL.M., MBA, AEP® (Distinguished) & Jeffrey Schoenblum, JD, AEP® (Distinguished)

Ethics of Negotiation
Michael H. Rubin, JD

Financial Issues for the Recent Widow or Widower
Jeremiah W. Doyle, JD, LL.M. (taxation), LL.M. (banking law), AEP® (Distinguished)

Valuation: How to Read and Critique an Appraiser's Appraisal
Stephanie Loomis-Price, JD, AEP® (Distinguished)

Reception for all Conference Attendees & Registered Companions

Thursday, November 7th
Technical Education

Hartman Axley Lifetime Service Award Presentation to Jeffrey N. Pennell, JD, AEP® (Distinguished)

Current Developments in Estate Planning
Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)

Estate Planning Hall of Fame® Ceremony honoring
Jay D. Adkisson Kathleen B. Leipprandt
Dirk Edwards Mary F. Radford
Neil E. Harl Julie Welch
Beth Shapiro Kaufman

Beyond the Numbers: Understanding Forms 1041 / 706 / 709
Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA

Concurrent Sessions (choices requested)

1:35 pm – 2:35 pm
Traps for the Unwary – Some Estate Planners' Proscriptions and Conundrums, a Deeper Dive
Richard A. Oshins, JD, LL.M., MBA, AEP® (Distinguished) & Jeffrey Schoenblum, JD, AEP® (Distinguished)

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

Planning for Parents of Minors
Sarah Moore Johnson, JD

Thursday, November 7th
Continued...

3:05 pm – 4:05 pm
New Kids on the Block(chain): Planning with Bitcoin and Cryptocurrency
Abigail Rosen Earthman, JD, LL.M.

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

Preparing the Next Generation for What's Ahead
Donna E. Trammell

4:15 pm Supplemental Private Session for Accredited Estate Planner® Designees and Estate Planning Law Specialist Certificants

Friday, November 8th
Technical Education

Optional Concurrent Breakfast Sessions
Accredited Estate Planner® Designation from A - Z
Learn about the AEP® designation from the experts at NAEPC

Getting Started on the Path to Specialization with the Estate Planning Law Specialist Certification
For actively-licensed attorneys who are interested in learning about the EPLS certification

Estate Planning and Trust Management for a Brave New World: It's all in the Family... What's a Family?
R. Hugh Magill, JD, AEP® (Distinguished)

Charitable Giving with Retirement Assets: Strategies, Traps and Solutions
Christopher R. Hoyt, JD, AEP® (Distinguished)

Powers of Appointment: Basics, Basis, and Beyond
Turney P. Berry, JD, AEP® (Distinguished)

Premier Sponsors



Partner Sponsor



Principal Sponsor



Learn More & Register
www.NAEP.org/conference

Sessions conclude at 12:15 pm

General Information

HEADQUARTERS

HOTEL & LODGING

NAEPC is delighted to host its 56th Annual Conference at **THE COSMOPOLITAN OF LAS VEGAS** in Las Vegas, Nevada. The NAEPC room rate is \$219 plus a \$25 resort fee (single/double occupancy, exclusive of applicable state and local taxes). Reservations must be made by 10/11/19 and can be made by calling 855-435-0005 and referencing group code "SNAEP9" or at www.NAEPC.org/conference.

CONTINUING EDUCATION

Continuing education credit will be available nationwide for estate planning-related disciplines to those who attend the Wednesday, 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.** Learn more at www.NAEPC.org/conference.

REFUND POLICY

Cancellations must be received in writing or via email to conference@naepc.org. A full refund will be granted if notice is received on or before 09/13/19. Registrants who cancel between 9/14/19 and 10/18/19 will forfeit a \$100 administrative fee. No refunds will be granted after 10/18/19. Requests to transfer registrations to another individual will be accommodated.

COMPANION PROGRAM

Companion registration is available to those attending with a primary registrant, but who are not attending the sessions. Tours are taking place on 11/06/19 and 11/07/19. Information is available at www.NAEPC.org/conference.

Tour Package	\$475
Meal-Only Package	\$300
Reception-Only	\$75/reception



REGISTRATION PACKAGES · Learn more about registration packages and additional discounts at www.NAEPC.org/conference

Advanced Estate Planning Strategies Conference with Pre-Conference Sessions

	Early	Regular	Late
Member	\$1175	\$1225	\$1275

Advanced Estate Planning Strategies Conference

	Early	Regular	Late
Member	\$1045	\$1095	\$1145
Non-Member	\$1270	\$1320	\$1370

Single Day Passes

	Early	Regular	Late
Tuesday	\$200	\$250	\$300

Wednesday or Thursday

Member	\$445	\$495	\$545
Non-Member	\$520	\$570	\$620

Friday

Member	\$275	\$325	\$375
Non-Member	\$325	\$375	\$425

Registration · Register Online at www.NAEPC.org/conference

<hr/> Last Name	<hr/> First Name & Middle Initial
<hr/> Professional Designations	<hr/> Nickname for Name Badge
<hr/> Company Name	<hr/> Street Address
<hr/> City, State & Zip Code	<hr/> Telephone Number
<hr/> Email Address	<hr/> Cell Number
<hr/> Affiliated Local Council	

Emergency Contact Name & Telephone Number	My participation: <input type="checkbox"/> Conference with Pre-Conference Sessions <input type="checkbox"/> Conference <input type="checkbox"/> Single Day(s) Pass _____
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Please tell us which type(s) of continuing education credit you will be requesting and provide your license numbers. For insurance and legal credit, please include the 2-letter state abbreviation in front of your National Producer Number (NPN) or identification number (example: NY1234567). If you have multiple states, simply separate each entry by comma (example: NY1234567, NJ1234567).

Certified Financial Planner® _____	CTFA (Banking) _____
CIE (Insurance) _____	AEP® No identification number necessary _____
CLE (Legal) _____	PACE _____
CPE (Accounting) _____	

Please check all events you will be attending and circle your preferred breakout sessions

<input type="checkbox"/> Tuesday Opening Reception · 5:00 pm	<input type="checkbox"/> Thursday Private AEP® / EPLS Session · 4:15 pm
<input type="checkbox"/> Wednesday Fun Run · 5:45 am	<input type="checkbox"/> Friday Breakfast AEP® A - Z · 7:30 am or
<input type="checkbox"/> Wednesday Reception · 5:00 pm	<input type="checkbox"/> Friday Breakfast EPLS Informational Session · 7:30 am

Thursday Breakout Session #1 Choice (1:35 pm) · Oshins & Schoenblum / Miller / Johnson
Thursday Breakout Session #2 Choice (3:05 pm) · Miller / Earthman / Trammell

Companion Last Name, First Name, Nickname for Name Badge

Companion Telephone	Companion Email
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Please check all events your companion will be attending

<input type="checkbox"/> Wednesday Companion Tour	<input type="checkbox"/> Thursday Companion Tour	<input type="checkbox"/> Wednesday Fun Run · 5:45 am
<input type="checkbox"/> Tuesday Opening Reception · 5:00 pm	<input type="checkbox"/> Wednesday Reception · 5:00 pm	

Register online, make check payable to "NAEPC" and mail to address below, or fax to 216-696-2582. By returning this page, you agree that you have read and understand the continuing education and refund policies and have reviewed the event conduct statement found at NAEPC.org/content/conduct.

If paying by credit card: Visa / MC / Amex # _____ Expiration: ____ / ____

Total: \$ _____ Signature: _____