



52nd Annual NAEPC Advanced Estate Planning Strategies Conference

with Pre-Conference Sessions for Council Leaders

· EDUCATION · COLLABORATION

November 18 - 20, 2015
Amelia Island, Florida · Omni Amelia Island Plantation

Pre-Conference · Council Leader Day November 18, 2015

Sessions begin at 7:30 am

Leadership sharing sessions for estate planning council board members and staff take place today, including updates on benefits available to all affiliates. Afternoon sessions are held as private, volunteer-led discussion groups for leaders from councils of like-size. The NAEPC webmaster is also available to discuss the website platforms offered to councils through NAEPC.

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

Companion Program ·

White Oak Conservation Center

***Estate Planning Hall of Fame®**

· 2015 ENTRANTS ·

Turney P. Berry, JD

Gerry W. Beyer, JD,
LL.M., JSD

John DeBruyn, JD,
LL.M. (taxation)

Michael W. Halloran, CFP®,
CLU®, ChFC®

Michael D. Mulligan, JD

Annual Conference November 19, 2015

7th Annual Fun Run & Walk

Sponsored Bonus Session · 7:00 am

The Secondary Market for Life Insurance:
Current Trends, New Applications
Provided by Coventry

Planning Potpourri
*Martin M. Shenkman, CPA, PFS, MBA,
JD, AEP® (Distinguished)*

Life Insurance - Key Cases and
Rulings of 2014-2015
*Stephan R. Leimberg, JD,
AEP® (Distinguished)*

Improving (and/or Revisiting) Popular
Estate Planning Strategies
*Richard A. Oshins, JD, LL.M., MBA,
AEP® (Distinguished)*

Nudging More Ethical Behavior through
Incentives and Checklists
Nancy B. Rapoport, JD

Annual Update
Steve R. Akers, JD, AEP® (Distinguished)

Portability or No: Death of the
Credit Shelter Trust
Diana S.C. Zeydel, JD, LL.M.

Special Private Session for
Active AEP® Designees
A Dialogue with Steve Akers, JD,
AEP® (Distinguished)

Companion Program ·

Lofton Creek Kayaking

Annual Conference November 20, 2015

Dealing with Uncle Sam,
Everyone's Least Favorite Relative
in the Family Business
*Samuel A. Donaldson, JD, LL.M.,
AEP® (Distinguished)*

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

All About that Basis: Creative Ways to
Obtain Basis at Death
Mickey R. Davis, JD

The 30,000 Foot View from the
Trenches: A Potpourri of Transfer Tax
Issues on the IRS's Radar Screen
*John W. Porter, B.B.A., JD,
AEP® (Distinguished)*

Sponsored Breakout Sessions

Option 1: The Case(s) for Household
Employment Compliance:
Case Studies Illustrating How to Mitigate
Tax & Legal Risk
Tom Breedlove
Provided by Care.com Homepay

Option 2: Financial Reform & Its Impact
on Your Merchant Account
Janelle Benefield
Provided by LawPay

Due Diligence in Selecting and
Understanding Life Insurance Policies
*Michael W. Halloran, CFP®, CLU®, ChFC®,
AEP® (Distinguished) Nominee*

Third Party Trusts in Divorce - Is a
Beneficiary's Interest Marital Property?
Jeffrey N. Pennell, JD

Companion Program ·

Art Program

Sponsors ·

Care.com®

HomePay™
Provided by Breedlove

LAWPAY®
CREDIT CARD PROCESSING

COVENTRY
REDEFINING INSURANCE®

EstateGen.com
Jefferson National

Please note, companion programs and schedule subject to change.

Lodging Information •

The conference will take place at the newly re-imagined Omni Amelia Island Plantation resort, nestled at the tip of Amelia Island, north of Jacksonville International Airport. The conference room rate is \$199 (single/double occupancy plus applicable taxes) and includes complimentary self-parking and in-room internet. Overnight accommodations can be made by calling (888) 261-6161 and using group code "110515National" or by booking at www.naepc.org/conference. Reservations must be made by 10/23/15.

Cancellation Policy •

Any cancellation 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 09/30/15. Registrants who cancel between 10/01/15 and 10/31/15 will forfeit a \$100 administrative fee. No refunds will be granted on or after 11/01/15.

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.

Transportation •

Information about rental cars and shuttle service can be found at www.naepc.org/conference.

Registrant Discounts •

\$50	Early Bird Discount (registration must be received by September 30, 2015)
\$50	Active AEP® or EPLS designee
\$50	Host Council Discount for Members of EPC of Northeast Florida NAEPF Volunteer Discount (available to non-board members of any committee of NAEPF)

Fee Computation & Payment Instructions

****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 NAEPF.**

Primary Registrant Fee
Less discount(s) - see left panel
Companion Registrant Fee
Subtotal
Add \$50 late fee if postmarked on or after 10/31/15 - TOTAL

Account Number

Signature

Exp. Date

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

2-Day Companion Registration Package \$450

Includes conference breakfasts, the Thursday – Friday companion tours & Wednesday welcome reception.
I will attend the welcome reception on Wednesday, November 18, 2015
I will participate in the fun run on Thursday, November 19, 2015 at 5:45 am
I will attend the companion tour on Thursday, November 19, 2015
I will attend the companion tour on Friday, November 20, 2015

3-Day Companion Registration Package \$475

Includes conference breakfasts, the Wednesday – Friday companion tours & Wednesday welcome reception.
I will attend the companion tour on Wednesday, November 18, 2015
I will participate in the fun run on Thursday, November 19, 2015 at 5:45 am
I will attend the companion tour on Thursday, November 19, 2015
I will attend the companion tour on Friday, November 20, 2015

Conference Educational Package \$850 \$1,100

Includes the Wednesday evening welcome reception, technical education sessions, presentation material & conference breakfasts & luncheons.
I will attend the welcome reception on Wednesday, November 18, 2015
I will participate in the fun run on Thursday, November 19, 2015 at 5:45 am
I am an active AEP® and will participate in the private session on Thursday, November 19, 2015
My Thursday sponsored breakout choice is Option _____
I have read and understand both the continuing education credit and cancellation policies (left panel).

Council Leadership Day Package \$900 N/A

Includes Council Leadership Day sessions and technical education sessions, presentation material, conference breakfasts & luncheons & the Wednesday evening welcome reception.

Member** Non-Member

Companion Telephone Number

Companion Email Address

Companion Street Address, City, State & Zip Code

Companion Last Name, First Name, and Nickname for Nametag Purposes

Affiliated Local Council Membership

Email Address

Fax Number

City, State & Zip

Telephone Number

Company Name

Street Address

Professional Designations

Nickname for Nametag Purposes

Last Name

First Name & Middle Initial