



# 58<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Virtual Conference

## November 2 - 4, 2021

### General Information

#### REGISTRATION

The registration fee provides an "all access pass" so you can come and go as you please during the event and for 30 days following, choosing sessions that are most meaningful to you and your practice and visiting with sponsors and exhibitors at a time that is convenient for your schedule.

AEP® Designee or EPLS Certificant Member / Member of Council	Complimentary \$95
Non-Member / Guest	\$250

### REGISTER HERE

#### CONTINUING EDUCATION CREDIT

Continuing education credit will be requested for Certified Financial Planner™ (CFP®) and Certified Trust and Fiduciary Advisor (CTFA) designees and will be available for Accredited Estate Planner® (AEP®) designees. Credit and certificates of completion will be available only to those who attend the LIVE VIRTUAL conference general sessions and complete attendance verification requests if prompted. In addition, a certificate of completion will be available for those who are able to self-file, attend the LIVE program, and complete attendance verification requests if prompted. Approval status will be communicated at [www.naepc.org/conference](http://www.naepc.org/conference) approximately one month prior to the conference.

See [www.naepc.org/conference](http://www.naepc.org/conference) for more details, including continuing education credit and refunds.



### Tuesday, November 2<sup>nd</sup>

11:00 am	Doors Open
11:00 am-12:00 pm	Networking & Exhibit Hall
11:30 am-12:00 pm	Exclusive Sponsor Bonus Session: Life Settlements & Policy Valuations <i>Jamie L. Mendelsohn &amp; Jon B. Mendelsohn</i> Ashar Group, LLC
12:10 pm-12:20 pm	Welcome
12:20 pm-12:40 pm	NAEPC Annual Meeting, Election & Presentation of Hartman Axley Lifetime Service Award to Natalie B. Choate, Esq., AEP® (Distinguished)
12:50 pm-1:50 pm	Recent Developments in Estate Planning (CE) <i>Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)</i>
1:50 pm-2:20 pm	Networking & Exhibit Hall
2:20 pm-3:20 pm	The 203 Best & Worst Planning Ideas for Your Client's Retirement Benefits (CE) <i>Natalie B. Choate, Esq., AEP® (Distinguished)</i>
3:20 pm-3:50 pm	Networking & Exhibit Hall
3:50 pm-4:50 pm	Just Like Starting Over – Decanting and Trust Modification (CE) <i>Amy K. Kanyuk, JD</i>
5:00 pm-5:05 pm	Closing Remarks
5:15 pm-5:45 pm	Concurrent Sponsor Bonus Sessions
5:15 pm-6:00 pm	Networking & Exhibit Hall
6:00 pm	Doors & Exhibitors Close Tentative Sponsored Social

### Wednesday, November 3<sup>rd</sup>

11:00 am	Doors Open
11:00 am-12:00 pm	Networking & Exhibit Hall
11:30 am-12:00 pm	Concurrent Sponsor Bonus Sessions
12:10 pm-12:20 pm	Welcome
12:20 pm-12:40 pm	AEP® Designation from A - Z
12:50 pm-1:50 pm	Income Tax Reform Including the Impact on Estate Planning (CE) <i>Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA®</i>
1:50 pm-2:20 pm	Networking & Exhibit Hall
2:20 pm-3:20 pm	The Thief in your Family - Forensic Accounting (CE) <i>Tiffany R. Couch, CPA/CFF, CFE</i>
3:20 pm-3:50 pm	Networking & Exhibit Hall
3:50 pm-4:50 pm	The New Normal for Charitable Tax Planning (CE) <i>Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®</i>
5:00 pm-5:05 pm	Closing Remarks
5:15 pm-5:45 pm	Exclusive Sponsor Bonus Session
5:15 pm-6:00 pm	Networking & Exhibit Hall
6:00 pm	Doors & Exhibitors Close Tentative Sponsored Social

We are grateful for the support of our sponsors



### Thursday, November 4<sup>th</sup>

11:00 am	Doors Open
11:00 am-12:00 pm	Networking & Exhibit Hall
11:30 am-12:00 pm	Concurrent Sponsor Bonus Sessions
12:10 pm-12:20 pm	Welcome
12:20 pm-12:40 pm	NAEPC Estate Planning Hall of Fame® Induction
12:40 pm-1:40 pm	Possible Estate and Income Tax Changes Affecting Estate Planning (CE) <i>Jonathan G. Blattmachr, Esq., AEP® (Distinguished)</i>
1:40 pm-2:10 pm	Networking & Exhibit Hall
2:10 pm-3:10 pm	Review of the Past Year's Significant, Curious, or Downright Fascinating Fiduciary Cases (CE) <i>Dana G. Fitzsimons, Jr., JD</i>
3:10 pm-3:40 pm	Networking & Exhibit Hall
3:40 pm-4:40 pm	Psychological Implications of Business Succession Planning (CE) <i>Stephan R. Leimberg, JD, AEP® (Distinguished)</i>
4:50 pm-4:55 pm	Closing Remarks
4:55 pm-5:30 pm	Networking & Exhibit Hall
5:30 pm	Doors & Exhibitors Close

All times shown are Eastern Time

