

# NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

## YEARLY NO-CHARGE SPEAKER PROGRAM

The “No-Charge” speaker program is one of the most valuable benefits offered by NAEPC to its 270<sup>+</sup> estate planning councils. The individuals noted below have agreed to speak (within noted guidelines)... **WITH THEIR HONORARIUM WAIVED!** Each speaker will present an educational topic, speak to the benefits of being a member of NAEPC, and current NAEPC board members may also be available to attend a board meeting to discuss the benefits of NAEPC affiliation in more detail. **Councils are also permitted to use one webinar in place of an in-person speaker, see page 10 for details.**

This special benefit is available to councils current with their dues and may be used once per fiscal year. Councils are required to submit their enrollment/registration form to NAEPC rather than contacting speakers directly.



Please note that programs are not available during the week of the Annual NAEPC Advanced Estate Planning Strategies Conference, scheduled from November 15-17, 2017, and may be limited during the Regional Leadership Day programs.

### · Available Speakers

**Hartman Axley, CLU<sup>®</sup>, ChFC<sup>®</sup>, JD, CFP<sup>®</sup>, MSFS, RHU, AEP<sup>®</sup>**

Denver, CO

*past president & current board of directors*

**Joseph V. Falanga, CPA, AEP<sup>®</sup>, TEP**

New York, NY

*past president*

**Thomas M. Forrest, TO, AEP<sup>®</sup> (Distinguished)**

Wilmington, DE

*past president*

**Michael W. Halloran, CFP<sup>®</sup>, CLU<sup>®</sup>, ChFC<sup>®</sup>, RICP  
AEP<sup>®</sup> (Distinguished)**

Jacksonville, FL

*past president*

**Al W. King, III, JD, LL.M., AEP<sup>®</sup> (Distinguished)**

New York, NY

*current board of directors*

**Lawrence M. Lehmann, JD, CAP<sup>®</sup>, AEP<sup>®</sup>**

New Orleans, LA

*past president*

**Lawrence J. Macklin, Esq., CPA, AEP<sup>®</sup>**

Baltimore, MD

*current board of directors*

**Clark B. McCleary, CLU<sup>®</sup>, ChFC<sup>®</sup>, MSFS,  
AEP<sup>®</sup> (Distinguished)**

Houston, TX

*past president*

**A. Stephen McDaniel, JD, AEP<sup>®</sup>, EPLS**

Memphis, TN

*past president*

**Jordon N. Rosen, CPA, MST, AEP<sup>®</sup>**

Wilmington, DE

*past president*

**Susan P. Rounds, JD, CPA, LL.M. (taxation), AEP<sup>®</sup>, TEP**

Los Angeles, CA

*current board of directors*

**Paul S. Viren, CLU<sup>®</sup>, ChFC<sup>®</sup>, AEP<sup>®</sup>**

Spokane, WA

*2017 national president*

**Shane Westhoelter, AEP<sup>®</sup>, CLU<sup>®</sup>, LUTCF**

Dublin, CA

*current board of directors*





**Hartman Axley, CLU®, ChFC®, JD, CFP®, MSFS, RHU, AEP®**

Availability: Up to 4 times per year / Programs up to 1.5 hours in length

**Topics:** The Estate Planning Council Movement; History of NAEPC; Conflict of Laws Affecting Beneficiary Designations; Collaborative Estate Planning

Hart is the longest-serving member of the NAEPC board, including being a past president and current participation on many committees of the association. In addition, he created the NAEPC logo key that contains four icons representing attorneys, accountants, trust officers and insurance & financial planning professionals. NAEPC presented Hartman Axley with the Hartman Axley Lifetime Service Award at the 41<sup>st</sup> Annual Conference in Atlanta in October, 2004, received in recognition of his many years of dedicated service, both to the field of estate planning and the NAEPC. He is often noted to be the "heart" of the NAEPC and has been active in every facet of the association during his lengthy term of service.

In "retirement" Hart continues to support NAEPC; NAIFA-Denver; the Rocky Mountain Chapter of SFSP; the Statutory Review Committee of the Colorado Bar Association by reading all introduced bills on insurance and estate planning and testifying on the "unintended consequences" therein; the Producers Advisory Counsel to the Colorado Insurance Commissioner; and AALU similarly pointing out "unintended consequences" on the congressional level by continuing communication with Colorado's two US Senators and seven US Representatives.



**Joseph V. Falanga, CPA, AEP®, TEP**

Availability: Up to 4 times per year / Programs up to 2 hours in length

**Topics:** Leveraging Wealth Transfer: from the Simple to Sublime; GRATs & Sales to Trusts; Fiduciary Accounting; Income in Respect of a Decedent

Joe is a managing director of UHY Advisors NY, Inc., and licensed as a CPA in the state of New York. Joe boasts more than 30 years of professional experience dedicated to serving the personal tax and financial needs of high net worth family groups, closely held businesses, and individuals. His focus includes tax planning and compliance for high net worth families and individuals, representing clients before the Internal Revenue Service and New York State, litigation support, estate & trust planning and administration, charitable planning and administration, family and business succession and governance, international trusts and estate compliance, closely held/private owned companies, and family held real estate companies. Joe holds a B.B.A. in accounting from Pace University, an MBA from Fordham University, and is a Trust and Estate Professional (TEP) designee as offered by STEP. Joe was the 2011 president of the National Association of Estate Planners & Councils and was the inspiration behind the "Falanga Fun Run", now held each year at the annual conference.



### **Thomas M. Forrest, TO, AEP® (Distinguished)**



Availability: Monthly / Programs up to 2 hours in length

Topics: Why Delaware? (Asset Protection, Dynasty, Total Return); Moving Trusts: Which Jurisdiction is Best – Roadblocks & Challenges; Changing Situs – Pros & Cons of Trusts Reformations, Decanting, Merger or Non-Judicial Settlement?

Thomas M. Forrest is president & CEO of U.S. Trust Company of Delaware. He is past president and founder of the personal trust division for Charles Schwab Bank in Wilmington, Delaware, a personal trust office he opened and staffed in 2007. Before joining Charles Schwab, Tom was co-founder, president and CEO of U.S. Trust Company of Delaware. He joined U.S. Trust Company in 1999 and opened the U.S. Trust office in Delaware in 2000, which he managed through 2007. Tom was vice president and manager of the trust tax and financial planning division for Wilmington Trust Company for 18 years. He is a past president of the NAEPC and Delaware Estate Planning Council, past treasurer of the Delaware Society of CPAs and past chairman of its tax committee. Tom is a past board member of the Society of Financial Service Professionals, Delaware chapter, and has served as a board member of the Philadelphia Estate Planning Council. Tom serves on the board of the Delaware Bankers Association, is a past president of the Bank and Trust Tax Association of Mid-Atlantic States, a member of the American Institute of CPAs, The Delaware Society of CPAs, and The Wilmington Tax Group. Tom is past board member of Autism Delaware and immediate past chairman of the Mary Campbell Center Foundation. While with Wilmington Trust, Tom assisted the IRS with the development of fiduciary income tax returns on magnetic media, becoming the first bank in the country to file fiduciary income tax returns in this manner. Tom has lectured extensively to professional groups on a variety of tax and estate planning topics nationwide.





**Michael W. Halloran, CFP®, CLU®, ChFC®, RICP, AEP® (Distinguished)**

Availability: Monthly / Programs up to 4 hours in length

**Topics:** Domestic Asset Protection Trust; BDIT's - Beneficiary Defective Inheritor's Trust; Grantor Retained Annuity Trusts; Charitable Remainder Trusts; Charitable Lead Trusts; Due Diligence in Choosing a Life Insurance Policy; Trust Owned Insurance Policies; Financed Life Insurance with Exit Strategies; Social Security Options for Those Nearing Retirement

Michael W. Halloran is a wealth management advisor with Northwestern Mutual Investment Services LLC and is an Estate Strategies Group Advisor and a member of Northwestern Mutual's Estate Business Planning specialist study group; he has been in the financial services industry for over 40 years. Mike carries securities registrations 1, 8, 63, and 65 and, along with his team, has a vibrant practice managing over \$180 million of client assets. A graduate of Florida State University and The American College, his approach to financial planning involves analyzing, planning, and implementing customized strategies and while he remains committed to providing comprehensive, integrated financial plans that reflect the clients' values and support their lifelong goals, his true passion lies within estate and business planning for individuals and businesses. Mike has received several industry awards and has been featured in national publications including *National Underwriter*, *Capital Executive*, *New York University Review*, *Money*, *Life Association News*, *Life Insurance Selling*, *USA TODAY*, *New York Times*, *Chicago Tribune*, *Congressional Quarterly*, and *Dow Jones News*, and speaks regularly throughout the United States on a variety of topics. He was inducted into the NAEPC Estate Planning Hall of Fame® in November 2015 and was honored with the Accredited Estate Planner® (Distinguished) designation at that time. Mike taught at the University of North Florida for 14 years. He is a past president of NAEPC, the Estate Planning Council of Northeast Florida, and the Jacksonville Association of Insurance and Financial Advisors, has served as a national director of the Society of Financial Service Professionals, and is a past member of the board of directors of the Florida Association of Insurance and Financial Advisors. He currently serves Physicians Nationwide as its executive director and is involved on various other community organizations. In his spare time, Mike enjoys running, public speaking, and going to Disney theme parks with his wife Sue.





**Al W. King, III, JD, LL.M., AEP® (Distinguished), TEP**

Availability: Up to 4 times per year / Programs up to 4 hours in length

Topics: Domestic Asset Protection Trust Planning in 2017 & Beyond; Changing the Situs of a Trust for Income Tax and Other Trust Law Benefits; The Modern Dynasty Trust – Who? What? When? Where? How? Why?; Are Irrevocable Trusts Really Irrevocable? – Reformation, Modification, Decanting and Trust Protectors; Why South Dakota? A Comparison of South Dakota Versus the Other Key Dynasty Trust States; Designing the 21<sup>st</sup> Century Irrevocable Trust; Popular Domestic Trust Strategies for International & Cross Border Families; The Next Tsunami – Charitable Giving with Non-Charitable Trusts: How the Wealthy are Using Modern Trust Structures to Provide Social and Fiscal Responsibility; Selecting Modern Trust Structures and Administration Based Upon a Family’s Assets; So You Want to be a Trustee? – Key Modern Trust Structures and Designs that Maximize this Role along with Asset Protection and Other Key Family Goals (i.e., Privacy, Governance, Family Values, etc.) While Minimizing Fiduciary Liability. Councils can choose a topic or combination of topics best suited to their program.

Al W. King, III is based in New York City and the co-founder, co-chairman and co-chief executive officer of South Dakota Trust Company LLC, South Dakota Planning Company, and the Estate Planning Institute. With currently more than \$35 billion in assets under administration, South Dakota Trust Company offers pure trust administration without any product, working with whomever the client/advisor wishes regarding investments, insurance, and custody. As a result of South Dakota’s unique trust laws, SDTC works with families all over the globe, serving as trustee as well as corporate and/or trust agent for family owned private trust companies. Mr. King was previously managing director and national director of estate planning for Citigroup and also the co-founder and Vice Chairman of Citicorp Trust South Dakota. In addition, he previously served as director of financial and estate planning for Coopers and Lybrand in Stamford, Connecticut. Mr. King has been inducted into the National Association of Estate Planners & Councils Estate Planning Hall of Fame® as a Distinguished Accredited Estate Planner. Additionally, Mr. King currently serves on the board of directors of NAEPC. He was also previously chairman of the advisory board for The NAEPC Education Foundation. Mr. King is the co-vice chairman of the editorial board of *Trusts and Estates* magazine and has been a member for more than 25 years. He is a member of several groups and organizations, including the Society of Trust and Estate Professionals (STEP), the International Association of Advisors in Philanthropy (AiP), New York Philanthropic Advisors Network (NYPAN), Fairfield County and New York City Estate Planning Councils, etc. He is frequently published and quoted in publications on various estate planning topics and addresses professional organizations, special interest groups, and general audiences regularly on the subject of estate and financial planning. Mr. King received a Bachelor of Arts cum laude from Holy Cross College, a Juris Doctor from Syracuse University Law School and an LL.M. in Tax Law from Boston University School of Law.





**Lawrence M. Lehmann, JD, CAP®, AEP®**

Availability: Up to 4 times per year / Programs up to 3 hours in length

Topics: Successful Collaboration Among Estate Planning Professions; Charitable Gift Planning Strategies; Client Centered Estate Planning: An Innovative Approach; NAEPC Council Membership & Benefits

Lawrence M. Lehmann is a graduate of Tulane Law School and is certified as a specialist in estate planning and administration, as well as taxation, by the Louisiana Board of Legal Specialization. He practices estate planning law in New Orleans as a member of Lehmann Norman & Marcus LC, a law firm now in its fourth generation. He has served as president of New Orleans Council of the Partnership for Philanthropic Planning, New Orleans Estate Planning Council, the Jewish Children's Regional Service, the New Orleans Hillel Foundation and the New Orleans Friends of Music. He is currently serving as the immediate past president of NAEPC and as vice-president of the Jewish Endowment Foundation of Louisiana. In addition, Larry is an instrument rated pilot, and is a founding member of Pilots for Patients, a non-profit organization that provides transportation for medically stable patients who live in Louisiana and require specialized medical care.



**Lawrence J. Macklin, Esq., CPA, AEP®**

Availability: Up to 4 times per year / Programs up to 3 hours in length

Topics: Most estate planning-related topics, including: Life Insurance Efficiency Planning; Enhancing Estate Planning with Derivatives; The Partnership Freeze as an Alternative to a GRAT/SIDGT; Important Issues in Modern Trust Design; (councils are welcome to work with Mr. Macklin to choose a topic best suited to their program)

Lawrence J. Macklin is a managing director and wealth strategist with U.S. Trust, Bank of America Private Wealth Management. He coordinates the development and delivery of innovative strategies and solutions for high net worth individuals and families in the areas of single stock concentrations, estate and wealth transfer planning, charitable giving and retirement, income tax, business succession and stock option planning. He also works closely with clients and their outside advisors to provide specialized wealth management and fiduciary services. Mr. Macklin began his tax and estate planning career in 1982 and joined U.S. Trust in 1994. Prior to joining U.S. Trust, he was associated with Venable LLP, a national law firm, as well as the accounting firm of Price Waterhouse. Mr. Macklin has served as an adjunct professor of law at Stevenson University (formerly Villa Julie College) in Baltimore, Maryland and as an adjunct professor of taxation in the graduate business program at The Johns Hopkins University. He has written for the *Journal of Wealth Management*, *The Practical Tax Lawyer* and various newsletters on tax and estate planning matters and has been quoted in *Entrepreneur*, *Financial Advisor*, and other publications. He has lectured for the Estate Planning Council of Naples, the Trust and Estate Study Group of the Maryland Bar, Pennsylvania Bar Institute, the Marcus Evans Private Banking Forum, Information Management Network, Financial Research Associates and Lorman Education Services. Mr. Macklin has also served as a recurring lecturer for the continuing professional education programs sponsored by the Maryland Association of Certified Public Accountants and the District of Columbia Institute of Certified Public Accountants.





**Clark B. McCleary, CLU®, ChFC®, MSFS, AEP® (Distinguished)**

Availability: Up to 4 times per year / Programs up to 2 hours in length

Topics: What I Would Want to Know About the Life Insurance Business if I Didn't Already Know It (Or at Least Thought I Did!)

Clark B. McCleary has been the recipient of a number of industry awards during his 50 years as a life insurance agent. He has spoken in more than half the states on life insurance issues and practice enhancement strategies. Clark was national president of the Society of Financial Service Professionals in 1999-2000 and was the first recipient to receive that organization's newly created Kenneth Black Leadership Award in 2006. He is a member of two NAEPC councils in Houston and is a past-president of the Houston Business and Estate Planning Council. The NAEPC honored Clark in 2006 by naming him a Distinguished Accredited Estate Planner® and electing him to the Estate Planning Hall of Fame®. Clark is past president of NAEPC having served in that role in 2012.

*A special note about Clark's presentation...* A few years ago Clark was asked to speak at his affiliated local estate planning council, the Houston Business and Estate Planning Council, for the fourth time during his 30 years of membership. He was uncertain what subject matter he should cover that the audience would find fresh and interesting, so he decided to let the membership determine his content. Clark emailed 15 members, five in each of the attorney, CPA and trust officer categories, and asked what issues they would like to hear him address. The response level was extremely high and well defined, which allowed Clark to construct a presentation that was very well received. He has continued to make that presentation, slightly modified over the years to keep up with the times, because the non-insurance and financial planning members request it.



**A. Stephen McDaniel, JD, AEP®, EPLS**

Availability: Up to 4 times per year / Programs up to 2 hours in length

Topics: Utilizing Disclaimers to Fix what is Broken; The Changing World of Estate Planning – It's Not About Taxes Anymore and this is Not Kansas; Fiduciary Liability – Why You Don't Want to be a Trustee

A. Stephen McDaniel is a partner in the law firm of Williams McDaniel PLLC in the Memphis, Tennessee, office. Mr. McDaniel formerly served as an attorney with Internal Revenue Service. He has served for over 25 years as an adjunct professor at the University of Memphis School of Law and has taught estate and gift taxation, estate planning, trust law, and insurance law. Steve is one of 22 Tennessee Certified Estate Planning Specialists. Mr. McDaniel was named by *Worth* magazine as one of the top 100 estate planning attorneys in the country. Most recently he was again included in the current edition of *Best Lawyers in America* and was named by *Tennessee Business* magazine as one of the top 150 attorneys in the State of Tennessee. Mr. McDaniel is the past president (2004) of the NAEPC, past president of the Memphis Estate Planning Council, and a member of the Memphis Bar Association and the Tennessee Bar Association. He is a fellow in the Memphis and Shelby County Bar Foundation.





**Jordon N. Rosen, CPA, MST, AEP®**

**Availability:** Up to 4 times per year / Programs up to 2 hours in length

**Topics:** Navigating the Basis Consistency Regulations; How to Navigate the 3.8% Investment Income Surtax; Year-end Tax Planning for Individuals, Businesses, Estates and Trusts; Post Mortem Tax Elections; Navigating the Portability Election; Planning for Estates Under \$10 Million

Jordon N. Rosen is the director of estate and trust services at the Wilmington, Delaware CPA firm of Belfint, Lyons & Shuman, P.A. He is a frequent speaker on income, trust and estate tax topics and has published more than 100 articles on tax related topics both locally and nationally. Jordon currently serves a past president of NAEPC and is also member and past president of Chester County Estate Planning Council and the Estate Planning Council of Delaware.



**Susan P. Rounds, JD, CPA, LL.M. (taxation), AEP®**

**Availability:** Quarterly / Programs up to 2 hours in length

**Topics:** Business Succession, Family Dynamics and Family Governance

Susan has over 25 years' experience working with elite clientele in the areas of tax and estate planning, business succession, risk management, philanthropy, family dynamics and family governance. She has made presentations across the country - from Atlanta to Alaska - on the topics Business Succession, Family Dynamics and Family Governance, and General Tax and Estate Planning. Before joining Morgan Stanley as Advanced Planning Director for the Southwest Region, Susan served in Big Eight Accounting, Merrill Lynch Family Office Group, The Family Office Exchange, Wells Fargo Business Advisory Services, and private legal practice. Susan taught Federal Estate and Gift Tax at the University of Georgia School of Law; Federal Income Tax, and Principles of Accounting at the University of Georgia Terry College of Business; and, all four parts of the Becker CPA Review Course. She was also a faculty member for the NYU Summer Institute on Taxation. Her articles have been featured in leading publications such as *Trusts and Estates Magazine*, *The Journal of Practical Estate Planning*, *The Journal of Private Wealth Management* and the *NAEPC Journal of Tax and Estate Planning*.







**Paul S. Viren, CLU®, ChFC®, AEP®**

Availability: up to 6 times per year / Programs up to 1 hour in length

**Topics:** Beneficiary Designations – How to get Back at Your Family!; Digital Assets & What a Practical Planner Can Do; The Sandwich Generation – Issues Dealing with Parents and Children; Four Case Studies that Challenge Every Estate Planner; The Death of Long Term Care Insurance – Now What Do We Do?; Term Life Insurance – The Real Story & What All Advisors Need to Know; Planning for the 99% - An Overview of Risk Management for All Clients

Owner and president of Viren and Associates, Inc., an independent financial services firm based in Spokane, Washington, Paul has been providing a broad range of services to his clients for 20 years. His firm has coined the phrase “Clear Solutions for the Chapters of Your Life”, which is the essence of his work. Whether planning and saving for retirement, building a business, providing employee benefits, protecting hard earned assets, paying for children’s college or investing, each of us goes through unique chapters in life and every chapter has a financial aspect. Paul is a graduate of Whitworth University in Spokane, Washington and has received his credentials from The American College as a Chartered Life Underwriter and Chartered Financial Consultant. He is registered as an Investment Advisor Representative along with securities registrations 6, 7, 24, 63, and 65, held at LPL Financial and life and health insurance. In 2011, he was nominated by his peers in the Spokane Estate Planning Council to be recognized as an Accredited Estate Planner®. He works with his spouse, Beth, and together they have built a successful practice of financial planning, managing \$200 million in brokerage and advisory assets as of December 31, 2016. They also provide services to employers and individuals for retirement plans, health insurance, life, disability and long-term care protection strategies. He is the past president of the Spokane Estate Planning Council, serves as the 2017 president of the National Association of Estate Planners & Councils, is an active member with Spokane Rotary Club 21 and has served on many boards and civic groups in the community. Paul is an avid backpacker and runner, loves to “turn” wooden pens from exotic wood from around the world, and wine tasting...not at the same time!

Securities offered through LPL Financial, Member FINRA/SIPC, Investment Advice offered through Viren and Associates, Inc., a registered investment advisor and separate entity from LPL Financial.

Paul Viren is registered to transact securities business with residents of the following states: AZ, CA, CO, FL, ID, IL, MT, NV, NY, OH, OR, TX, VA, WA.





**Shane Westhoelter, AEP®, CLU®, LUTCF**

Availability: Monthly / Programs up to 4 hours in length

Topics: Take the “If” Out of Life, Learn to Live: What if I Live, What if I Linger, What if I Leave, What is my Legacy? ; Learn how to Market and Stop Selling!

Shane Westhoelter is CEO of Gateway Companies, Gateway Financial Advisors, Inc., and Gateway Insurance Group, Inc. He is a Registered Representative, and a Registered Investment Advisor Representative with Cambridge Investment Research, Inc. Shane has helped over 550 financial advisors as a business performance coach and is recognized as a national speaker for the financial services industry. Starting as an independent insurance agent in 1988, Shane went door to door to establish his client base. In 1990, he established Gateway Financial Advisors, Inc. as an insurance agency and an Independent Registered Investment Advisory Firm, which expanded nationally to over 200 office locations, with over \$20 million in revenue and \$2 billion of assets under management. In addition, he is founder and CEO of Gateway Insurance Group, Inc., providing fixed and P&C insurance to over 2,000 insurance brokers. He is a published author for *Insurance Selling* magazine, *Society of Financial Service Professionals*, and *Financial Planning* magazine, is a member of many industry associations and, through his career, has served in many leadership positions for industry and community organizations. Shane has been the recipient of many awards and accomplishments, including the Two Million Dollar Award (1996), Five Million Dollar Award (1999), National Quality Award (1998 – 2002), Leadership In Life Institute Graduate (2003), Million Dollar Round Table (1996-2006), Court of the Table (2006 – 2010), Top of Table (2011-2016), Financial Advisor of the Year Award, St. Louis Missouri (2006), Financial Advisor of the Year Award for State of Missouri (2006), Board Advisor of the Year Award (2007), NAIFA St. Louis Hall of Fame Award (2008), and the Award of Excellence by the HOS Business School at Berkley University of CA (2008). In his spare time Shane likes to run, bike, hike, swim, and dine out.

· **Special Webinar Opportunity!**

**Tired of the same old meeting format?**

**Considering new programming ideas?**

**Trying to engage younger members?**



As you create your programming schedule for the upcoming season, why not consider adding a webinar or two? At the recent [Regional Leadership Day](#) events, programming was consistently noted as a key component to member satisfaction, growth, and retention. Distance-learning programs are a great way to bring your EPC high-caliber speakers with little or no cost. The Robert G. Alexander Webinar Series is available to councils for live or on-demand\* group showings. Councils have reported offering the webinars as a regular part of their schedule, for special “meet up” brown bag events, and even as a free member benefit or special program for AEP® designees.

Councils can opt to take advantage of either one in-person speaker **or** one group webinar in the Robert G. Alexander Webinar Series! A full listing of past and upcoming programs can be found at <http://www.naepc.org/events/webinar>. Please indicate your webinar preference on the enrollment/registration form.

*\*Programs can be shown at a date and time chosen by the council as long as it is at least 48 hours after the live broadcast.*



## · How Does the In-Person Program Work?

- ⌘ One presentation or webinar per council is available (September 2017 – August 2018)
- ⌘ Councils must adhere to the timing restrictions provided by the speaker.
- ⌘ **Specific presentation dates will be accepted at the time of application, but are not guaranteed. NAEPC will work with speaker to gauge his/her availability.**
- ⌘ Council is responsible for speaker's travel and lodging expenses.
- ⌘ All expenses to produce the meeting (print, postage, food, audio-visual, continuing education, etc.) are the sole responsibility of the Council. **Speaker will not be responsible for printing or shipping costs to prepare outlines, presentations, etc.**
- ⌘ Council must allow speaker minimal time to offer a brief description of the programs and services available to members of the NAEPC and/or to distribute information.
- ⌘ Council is welcome to invite speakers who are currently on the NAEPC board to attend a board meeting.
- ⌘ Once awarded, Council agrees to notify the speaker and NAEPC immediately if plans change and the program will not be offered.
- ⌘ Once awarded, it is the responsibility of the Council to handle all arrangements with the speaker / speaker's representative.
- ⌘ All presentations will be awarded on a first come, first served basis.

After submitting page 12 of this packet via email to [eleanor@naepc.org](mailto:eleanor@naepc.org), a representative from the NAEPC will email the council contact with availability for the speaker. If the speaker is available, the council will be supplied with contact information for the chosen presenter. The council should then reach out to the speaker to confirm date and time arrangements within 30 days of receipt. Please call Eleanor M. Spuhler at the NAEPC office with any questions. Thank you!

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National Association of Estate Planners & Councils

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• NAEPC “No Charge” Speaker Request Form

Return this page to  
eleanor@naepc.org

Council Name \_\_\_\_\_

Contact Name \_\_\_\_\_

Contact Position within Council (circle one): Administrator    Officer    Board Member    Other

Contact Phone \_\_\_\_\_ Contact Email \_\_\_\_\_



• We would like take advantage of a webinar instead of an in-person presentation and prefer the following program (see page 10 for more information)

\_\_\_\_\_

Our Speaker Choice (options accepted)		Presentation Date (options accepted)	Meeting Time	Presentation Length
	Hartman Axley			
	Joseph V. Falanga			
	Thomas M. Forrest			
	Michael W. Halloran			
	Al W. King, III			
	Lawrence M. Lehmann			
	Lawrence J. Macklin			
	Clark B. McCleary			
	A. Stephen McDaniel			
	Jordon N. Rosen			
	Susan P. Rounds			
	Paul S. Viren			
	Shane Westhoelter			

