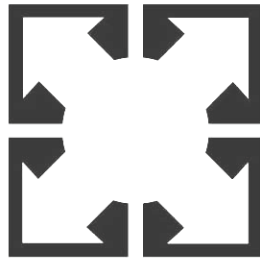


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Central Arizona Estate Planning Council

2013/2014 Season	Officers
Emily Burns	President
Steve Taddie	Vice President
David Walser	Treasurer
Darlene Hagan	Secretary
Joseph McCabe III	Past President

Newsletter Date: November 1, 2013

Website Features

Monthly Spotlight

• Public Access

[Find a Planner](#)

• Member Usage

[Member Renewal](#)

[Event Registration](#)

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Current Highlights

Showcase Your Firm Support The Council

Sponsorship support of our programming provides our members with this exceptional value...If you are a serious estate planner, you can't afford NOT to join. If you are serious about expanding your branding, visibility, and image as a quality company to the Arizona Estate Planning Community, you can't afford not to consider sponsorship.

A few of CAEPC's programs remain open for sponsorship:

- [January Dinner Program](#)
Beverly Brautigam, CPA
Hal Bartholomew, Esq.
- [February Half Day Program](#)
Robert Keebler
(Two sponsorships available)

- Annual Estate Planners' Golf Tourney to be held at the Phoenix Country Club

Review [sponsor benefits](#).

Need More Information?

Visit the [sponsor page](#) of the CAEPC website or contact this year's sponsorship chair, [Joe McCabe III](#),

Forward this e-newsletter to a professional who should consider joining!

Member Benefit Connects to the Public

As our council grows in size and visibility, calls for referrals to estate planning professionals become more frequent. The council cannot endorse any member over another, but has an ombudsman role for the general public in accessing member professionals.

Your CAEPC website has a publicly accessible list of those planners who elected to have their firm logo and e-mail posted visibly to the public

Take advantage of this member benefit for only \$25.00. Process your purchase on the [sponsor purchase page](#) of the website today!

President's Message: Emily Burns

Greetings to All:

The Board of Directors is hoping and planning for more member involvement, this year and in future years, in the planning and activities for CAEPC. We are happy to have committee chairpersons already, for most committees, who are listed on an organizational chart on this website with contact information for each. We will have committee sign-up sheets available at the registration table at our November 4th meeting. I urge you to join one of the committees, meet new people, and become involved in our group.

Following is a list of our committees:

Membership
Nominating
Emerging Planners
Accredited Estate Planners
Newsletter
Golf Tournament
Legislative Affairs
Meeting Ambassadors
Community Outreach

Also, please remember that we invite members to sign up for consideration by the nominating committee for appointment to the Board of Directors. Board members serve a three-year term. Board meetings are generally held starting at mid-afternoon

the days of our regular speaker meetings throughout our membership year. We will have applications available at the November meetings.

I think we all recognize that we get more out of an organization the more we put into it.

We're all looking forward to cooler weather and happy to have survived another summer!

I look forward to seeing all of you at our November 4th meeting.

Emily Burns, JD
2013-14 CAEPC President

Around the Corner: Upcoming Events!

Emerging Professionals' Group

Are you or someone you know an emerging professional? Please join the EPG for a joint venture with NexGen, where we will kick off our year at the Del Frisco's Grille in Phoenix.

November 12, 2013
5:30-7:30pm

Del Frisco's Grille
2425 E Camelback Rd #110
Phoenix, AZ 85016

Please RSVP to:
emergingprof@caepc.org

December 2nd Holiday Event

On December 2nd, bring your favorite companion and celebrate the season!

Entertainment provided by:

"The Dinner Detective"

Come early, share a cocktail with fellow planning professionals, and leave with holiday spirit

[Registration is open](#)

Board Meetings

Did you know your CAEPC Board of Directors generally meet at the Phoenix Country Club preceding the monthly member programs? Did you know board meetings are open to members? You can register to attend a board meeting on the [meeting registration page](#) of the CAEPC website. Come see your board at work! The next board meeting is this Monday, November 4th at 3:15pm.

Save The Date:

Half-Day Program and Ice Cream Social February 3, 2014

This season's half-day program will feature national speaker Robert Keebler of Keebler and Associates. Mr. Keebler will be presenting on:

"IRA at Death & Beyond"

This four-hour CE program includes lunch and a half-time break with an ice cream social.

Annual Estate Planners' Golf Tourney and Member Banquet April 21, 2014

This season's golf tourney and member banquet will be held at the Phoenix Country Club. We are very excited to hold this event at the venue that has taken such good care of our group throughout the year.

Heard On The Floor:

**Bruce Read, AEP, CLU, ChFC, CASL
CAEPC 2013/14 Event News Reporter**

When Members were asked what they hoped to accomplish with CAEPC this year, we heard:

"I'd like to see continued emphasis on Arizona trust, estate and gift laws."

"I prefer the practical stuff, the stuff that applies to the work I do; also what's unique to Arizona."

"I want to learn more Arizona asset protection applications, the specifics of separate and community property laws."

"To survive."

"To continue and build and develop relationships."

When Members were asked what they liked about membership in CAEPC, we heard:

"I like the size, other groups in the valley are smaller, and this group has a diversified group of professions. I think this experience level increases my knowledge and expands my options, something I didn't expect"

"I appreciate the depth of our members. Having been a member since the mid-1990's I see the commitment of the group to enhance its members."

"I like having the resources of CAEPC, the classes, events and members. I like to know whom to refer my clients to, I'm confident knowing the level of expertise and professionalism of CAEPC members."

"I meet quality people at every meeting; for the last eight years. I intentionally try and sit with members I have yet not met. Its kind of an endless process."

"I like having front row access to top advisors. I was disappointed to see member speakers on the agenda this year. I prefer non-member speakers or an open bid process for members if an industry is represented. No offense to the speakers."

NAEPC News and Information:

NAEPC 50th Annual Conference “What You Learn In Vegas Won’t Stay In Vegas” November 20-22, 2013

Please plan on joining NAEPC & The NAEPC Education Foundation this November in Las Vegas, Nevada. The hosting property, The Cosmopolitan of Las Vegas, is the newest property on the Las Vegas Strip and the annual conference provides the perfect opportunity for just a little extra time away! Plan now to join the celebration of 50 years of exceptional conferences and educational programming!

[ONLINE REGISTRATION IS NOW OPEN!](#)

[DOWNLOAD THE REGISTRATION BROCHURE HERE!](#)

Interested in obtaining an Accredited Estate Planner® Designation? (AEP®)

Professional estate planners can now achieve an accreditation that acknowledges their experience and specialization in estate planning. The Accredited Estate Planner® designation is available to attorneys, Chartered Life Underwriters, Certified Public Accountants, Certified Trust and Financial Advisors, Chartered Financial Consultants, and Certified Financial Planners®. The AEP® designation is awarded by the National Association of Estate Planners & Councils to recognized estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character.

Please click this link to learn more..... <http://www.naepc.org/designations/estate-planners>

Contact the Central Arizona Estate Planning Council AEP committee chair, [Harry Calivas](#), for additional information and find out how the CAEPC can assist with the process and possibly help reduce the application fee.

Interested in obtaining an Accredited Estate Planner® Designation? (AEP®)

Leimberg is a valuable and wonderful resource for keeping up to date on recent changes related to estate planning. This service is provided to our members at no additional cost. If you are a current member of CAEPC, you have a subscription to Leimberg. You should have received notice directly from NAEPC with instructions to getting your access information on the Leimberg website. Here is the [Leimberg notice](#) posted to the members' only section of the CAEPC website for ease of reference and use. (Note: You will need to log in to the CAEPC website to access this notice.)

Estate Planning Technical Updates and Articles:

Same-sex marriage tax treatment.

Bullet-point summary of IRS ruling implementing federal tax aspects of June 26, 2013, U.S. Supreme Court decision, which invalidated a provision of the Defense of Marriage Act. LISI Estate Planning Newsletter #2136 (August 29, 2013) at <http://www.LeimbergServices.com>.

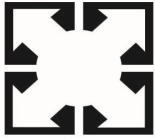
Permanent increase in generation-skipping transfer tax exemption to \$5,000,000 (indexed from 2010)

Excellent discussion by Beth Shapiro Kaufman, of Caplin & Drysdale, particularly with respect to use of the increased (and still-increasing because of indexing) GSTT exemption for prior taxable gifts. LISI Estate Planning Newsletter #2140 (September 11, 2013) at <http://www.LeimbergServices.com>

Charitable gifts come in many forms

Q: In our financial plans, we've been considering our retirement and ways to support our children and grandchildren, but we'd also like to think about supporting our favorite charities. How can we do more than our usual annual gifts? –H.S. Texas

A: When you decide the time is right for you to make a charitable gift(s) to your favorite nonprofit organization or cause(s), don't assume that just writing a check is the only option. You have a wide variety of techniques and assets you can use to fund charitable gifts, including some of the following strategies. [Read more.....](#)



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HENRY & HORNE, LLP
Certified Public Accountants



braunsilerkruzel_{pc}
attorneys at law



VESTPOINTE
WEALTH MANAGEMENT

Charles W. Whetstine, P.C.



CAEPC graciously thanks our 2013-14 inaugural Print Sponsor



2013/14 season sponsorships available. Please visit the [sponsor page](#) of the website.

Special Mentions: Congratulations Elizabeth Shabaker!

Elizabeth has been elected, as of July 31, 2013, as a shareholder of her firm, Versant Capital Management, Inc. Elizabeth earned this prestigious honor with her firm by serving as a chief operating officer and senior investment counselor, providing immensely dedicated client service and assisting with the firm's growth.

2013/2014 CAEPC Committees

Membership: Steve Taddie and Bill Perdue

Sponsorship: Joseph McCabe III

Emerging Planners' Group: Darren Case

Holiday Event: Darren Case and the EPG Group

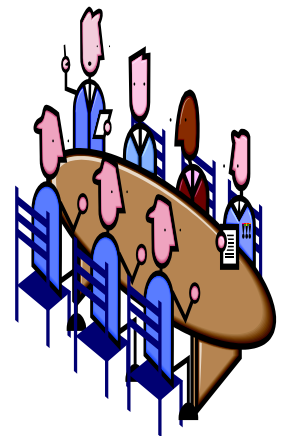
Newsletter: Harry Calivas, Lou Comus and Bruce Read

Golf Tournament: Nick Kolesar

Legislative Affairs: Roger Curley

Meeting Ambassadors: Kyle Decker

Members interested in getting involved, please visit the [committee reference page](#) on the CAEPC website or email info@caepc.org



The Central Arizona Estate Planning Council was established in the 1960s as a professional organization for diverse practitioners involved in the estate planning process. With emphasis on the estate planning team, our focus is to gain a broader perspective of pertinent issues and ideas, in order to construct and protect our clients' financial estates and to achieve a smooth transition of wealth from one generation to another. Estate planning is one of today's fastest-evolving professional disciplines, as ever-changing tax laws and volatile market values have created opportunities for practitioners and clients alike. The Council regularly presents top national speakers at power-packed dinner meetings offering both continuing education and networking opportunities. Council members further benefit from an afternoon seminar with a national strategist, an ice cream social, a spouses' night and a golf outing - - all designed to promote professionalism and reciprocal associations among the Council professionals.