



53rd Annual NAEPC Advanced Estate Planning Strategies Conference

Special Brochure for Members of Central Arizona Estate Planning Council

• EDUCATION • COLLABORATION

November 16 - 18, 2016
Litchfield Park, Arizona · The Wigwam

Annual Conference Welcome *November 16, 2016*

5:00 pm - 6:30 pm

Welcome Reception for All Conference
Attendees & Registered Companions

Annual Conference, Day I *November 17, 2016*

8th Annual 2-Mile Fun Run & Walk **5:45 am**

6:30 am - 7:45 am

Breakfast with Exhibitors

7:45 am - Welcome & Opening Remarks

8:00 am - 9:00 am

The Critical Importance of High
Investment Returns and Tax Free
Compounding, and How to Achieve
Them

Jonathan G. Blattmachr, Esq.,
AEP® (Distinguished)

9:05 am - 10:05 am

Ten Charitable Planning Ideas for the
Current Environment
Kathryn W. Miree

Break with Exhibitors

10:30 am - 11:30 am

The Mathematics of Estate Planning
Robert S. Keebler, CPA/PFS, MST,
AEP® (Distinguished), CGMA

11:30 am - 12:30 pm

Sponsored Session
provided by Ashar Group, LLC
Policy Valuation and Transfer Tax
Conventions vs. Market-Based
Valuations

Lawrence Brody, JD, LL.M.,
AEP® (Distinguished) & Jon B.
Mendelsohn

Annual Conference, Day I, cont'd...

CAEPC Block – **Complimentary for CAEPC members**

12:30 pm - Lunch with Exhibitors
(optional add-on, \$25 fee applies)

1:30 pm - 2:30 pm

Collaboration Across Small and Great
Divides: Teamwork, Tensions, and
Client-Centered Solutions
Nancy B. Rapoport, JD

2:35 pm - 3:35 pm

Privileges/Valuation - Exploring Privileges
in the Context of Hiring Appraisers
Stephanie Loomis-Price, JD

Break with Exhibitors

4:05 pm - 5:05 pm

What Can We Learn from the Estates of
Deceased Celebrities?
John J. Scroggin, JD, LL.M., AEP®

5:15 pm - 6:15 pm

Concurrent Sessions (please indicate
attendance on the registration form):

Option 1: Exclusive AEP® and EPLS
Designee Session: Fearless Public
Speaking for Estate Planners, a dialogue
with Conrad Teitell, LL.B., LL.M.,
AEP® (Distinguished)

Option 2: The Accredited Estate Planner®
Designation Program
from A - Z®

Annual Conference, Day II *November 18, 2016*

7:00 am - 8:00 am

Breakfast with Exhibitors

8:00 am - 8:15 am

Opening Remarks

Annual Conference, Day II, cont'd...

8:15 am - 9:15 am

Annual Tax Update
Samuel A. Donaldson, JD, LL.M.,
AEP® (Distinguished)

9:15 am - 9:45 am

Annual Awards &
Estate Planning Hall of Fame®
Induction Ceremony

Break with Exhibitors

10:10 am - 11:10 am

An Interview on the Nature and Practice
of Our Profession and its Capacity to
Meet the Challenges of the "Shirt
Sleeves" Proverb
James E. Hughes, Jr., Esq.

11:15 am - 12:15 pm

The Governing Law Clause in Trusts - Not
Just Boilerplate Anymore
Jeffrey Schoenblum, JD,
AEP® (Distinguished) Nominee

Lunch with Exhibitors

1:15 pm - 2:15 pm

Family and Multi-Disciplinary Team
Dynamics for High Performance Family
Wealth and Business Succession Planning
Kathy K. Wiseman

2:20 pm - 3:20 pm

Sponsored Session
provided by
Sterling Foundation Management
Secondary Planning for CRTs
Evan Unzelman

Grab & Go Break

3:35 pm - 4:35 pm

Loan Regime Split-Dollar for Both Single
and Joint Lives
Michael Amoia, JD, LL.M., CLU®, ChFC®

4:35 pm - 4:45 pm - Closing Remarks

Lodging Information •

The conference will take place at The Wigwam. The NAEPC room rate is \$179 (single or double occupancy plus applicable taxes) plus a \$6/night resort fee. The resort fee includes in-room internet, access to the fitness center, and overnight self-parking, among other amenities.

Overnight accommodations can be made by calling (800) 327-0396 and letting the reservationist know you are with NAEPC or by booking online at www.naepc.org/conference. Reservations must be made by 10/21/16.

Cancellation Policy •

Please communicate your inability to attend by 11/11/16 to conference@naepc.org.

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*). Those who attend as a part of the CAEPC Block will receive credit for the sessions they attend.

***IMPORTANT NOTE:**
Life insurance professionals must attend the entire conference to receive credit as partial credit is not available.

Registrant Discounts •

- \$50 Early Bird Discount (registration must be received by 09/30/16)
- \$50 Active AEP® or EPLS designee
- \$100 NAEPC Volunteer Discount (available to volunteer members of any committee of NAEPC)

NAEPC is proud to partner with Central Arizona EPC to provide the CAEPC Block of programming at this conference.



The Central Arizona Estate Planning Council has made it possible for active members to attend the “CAEPC Block” of programming on Thursday, November 17, 2016 at no cost to the member! Included in your CAEPC dues, attendees can take advantage of the sessions and CE credit* from 12:30 pm – 6:15 pm (pre-registration required).

Those who wish to supplement the “CAEPC Block” by attending either the exhibit hall luncheon on Thursday, November 17, 2016 from 12:30 pm – 1:30 pm, or the entire NAEPC Advanced Estate Planning Strategies Conference, are welcome to do so! Fees apply, see below.

CENTRAL ARIZONA ESTATE PLANNING COUNCIL MEMBER REGISTRATION FORM
Registration Required by Wednesday, November 2, 2016

Last Name	First Name & Middle Initial
Professional Designations	Nickname for Nametag Purposes
Company Name	Street Address
City, State & Zip	Telephone Number
Email Address	

My attendance...

CAEPC Block

The package includes sessions and CE credit from 12:30 pm – 6:15 pm on Thursday, November 17, 2016.*

- I would like to add-on the exhibit hall luncheon at 12:30 pm on Thursday, November 17, 2016 and have supplied a credit card number below for the \$25 fee
- I am an active AEP® and will participate in the private session on Thursday, November 17, 2016 at 5:15 pm
- I am interested in learning more about the AEP® designation and will attend the “A-Z” session on Thursday, November 17, 2016 at 5:15 pm
- I have read and understand the continuing education credit information and agree to cancel by November 11, 2016 if I am unable to attend

Entire Annual Advanced Estate Planning Strategies Conference • \$625 (additional discounts available, see left)

The registration fee includes the Wednesday evening welcome reception, technical education sessions, presentation material & conference breakfasts & luncheons.

- I will attend the welcome reception on Wednesday, November 16, 2016
- I will participate in the fun run on Thursday, November 17, 2016 at 5:45 am
- I am an active AEP® and will participate in the private session on Thursday, November 17, 2016
- I am interested in learning more about the AEP® designation and will attend the “A-Z” session on Thursday, November 17, 2016 at 5:15 pm
- I have read and understand the continuing education credit information and agree to cancel by November 11, 2016 if I am unable to attend

Fee Computation & Payment

Entire Conference Registration Fee	_____
Less discount(s) - see left panel	_____
Luncheon Registration Fee (\$25)	_____
TOTAL	=====

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

Account Number	Exp. Date
Signature	

NAEPC Estate Planning Hall of Fame®
2016 Entrants

Dave L. Cornfeld, JD
 Jeffrey Schoenblum, JD
 Diana S.C. Zeydel, JD, LL.M.

Ceremony November 18th, 9:15 am

**Recognizing Excellence in Estate Planning
 and Service to the Profession**