Serving Individual Members and their Councils

National Association of Estate Planners & Councils

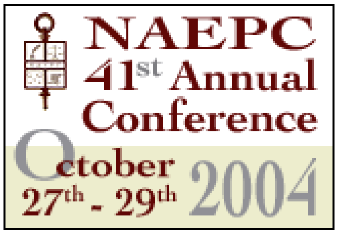
NAEPC NEWS

Visit the NAEPC at:

http://www.naepc.org/

Vol. 1, Issue 2, September 2004

WELCOME TO THE NAEPC ANNUAL CONFERENCE NEWSLETTER



We hope you enjoy our ANNUAL NAEPC CONFERENCE newsletter. I would like to personally invite you to the upcoming 41st Annual NAEPC Conference in Atlanta, GA at the Renaissance Waverly Hotel from October 27 through 29, 2004. The speakers and topics are the most impressive ever! A brochure is available on our website, http://www.NAEPC.org.

Technical Programs: The technical portion of the Conference, October 28th to 29th, includes some of most prominent estate planners, lecturers and authors in the country, including:

Jonathan Blattmachr, JD, will be addressing "The Changing Nature of Estate Planning". Mr. Blattmachr is a noted lecturer, author of over 250 articles, and co-developer of the Wealth Transfer Planning System. He will cover the impact on our estate planning practices that arise from the uncertainties of future federal and state legislation, the continuing Internal Revenue Service attacks some of our favorite planning techniques, the changes in economy ranging from the financial markets, interest rates and economic outlooks, and the federal and state budget problems and related political issues.

Steven Leimberg, JD, will discuss "Marketing Estate Planning Services in These Changing Times". Mr. Leimberg is CEO of Leimberg Information Services, Inc. , a provider of information and commentary on tax cases, rulings and legislation, and will provide insights into the marketing aspects of estate planning.

Professor Jeff Pennell will provide an "Update on Current Estate Planning Changes". Emory University Professor Pennell will cover the myriad of changes that have occurred over the last year, including the Simplified GST Allocations Revenue Procedure and the current status of the myriad of cases and rulings that impact the valuation arena and the Internal Revenue Service attacks in this area.

Lee Haussner, Phd. will address family issues and wealth in "So You're Not a Psychologist, How Do You Handle These Family Issues?" Ms. Hausner is National Chairperson and National Director for the Institute for Family Enterprise. A frequent lecturer and author, her talk will focus on the people issues that are inherent in wealth and estate planning. She will cover the "four capitals of wealth… human, intellectual, financial, and social capital".

Stacy Eastland, JD: this noted lecturer will address the "Modern Portfolio Management Meets the Changing Environment in Wealth Management". Mr. Eastland, Managing Director of Goldman Sachs & Company, will cover the modern portfolio management in the changing environment we are all facing in our wealth and estate planning. Continued on Page 4….

Come to Atlanta for the 41st Annual Conference

From the President, Steve McDaniel, Memphis, TN

For More Information:

http://www.naepc.org/convention.web

"Please forward this e-mail newsletter to your council officers and directors and to your estate planning members. Thanks, Steve."

COME TO "***COUNCIL LEADERSHIP DAY***" on October 27, 2004 at THE NAEPC ANNUAL CONFERENCE

- *Meet other councils*
- *Meet the NAEPC leaders*
- *Share ideas*
- *Leadership development*

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The 41st Annual NAEPC Conference, Atlanta, GA– The Council Leadership Day, October 27, 2004

On the first day of the 41st Annual NAEPC Conference, October 27th, is the Council Leadership Day. The NAEPC Annual Meeting is in the morning, followed by break-out sessions by small, medium and large councils that will look at the challenges of running a successful and energetic Estate Planning Council. Issues to be discussed include programming, public awareness and media relations, membership categories, and finances. Come to learn more about the ways to better run your Council.

NAEPC 41st Annual Conference
October 27th - 29th 2004

Come to Atlanta for the 41st Annual Conference

Become an Accredited Estate Planner

Professional estate planners can now achieve an accreditation that acknowledges their experience and specialization in estate planning!

An ***Accredited Estate Planner***℠ is a person who has earned a graduate level specialization in estate planning designation in addition to already recognized professional credentials within the various disciplines of estate planning.

It is awarded by the National Association of Estate Planners & Councils℠ to recognize estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation and character. An ***Accredited Estate Planner***℠ must embrace the team concept of estate planning and adhere to the NAEPC's℠ professional code of ethics.

As a part of the NAEPC's℠ advocacy program, ***Accredited Estate Planners***℠ will be given priority in requests for referrals within each professional discipline that result from NAEPC℠ promotion and advertising campaigns. In addition, NAEPC℠ promotions will prominently feature the AEP℠ designation and the advantages of working with an AEP professional.

More Details: http://www.naepc.org/estate_planners.web

Estate Planning Councils,

DID YOU KNOW? ……THE NAEPC CAN PROVIDE:

- *Web Site Packages*
- *Local Council Nominated Accredited Estate Planners*
- *Discounted Leimberg Access, Trusts and Estate Magazine subscriptions and Planning Software*

"Please forward this e-mail newsletter to your council officers, directors and your estate planning members." Thanks, Steve McDaniel, President, NAEPC.

Do You Need a Speaker?

President Steve McDaniel speaks often around the US

The NAEPC can help your local Estate Planning Council find a speaker. With our Speaker's Bureau, we can help you find a local speaker to speak to your Council on a wide range of estate planning topics. Searchable by state, keyword or name, our Speaker's Bureau is there to assist in building a dynamic program for your local Council. Visit us at the site noted below, and enter a state, or keyword topic, or speaker name and hit Search. A list of potential speakers will show:

If you would like to be part of the NAEPC Speaker's Bureau or would like to nominate someone that has spoken to your council, please contact us.

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Estate Planning Councils in the News

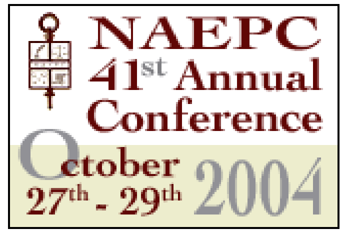
- Atlanta, GA: The Estate Planning Council of North Georgia and the Atlanta Estate Planning Council are proud to host the NAEPC's 41st Annual Conference.
- Dallas, TX: The Estate Planning Council of North Texas is already planning for the 2005 42nd Annual NAEPC Conference that will be held September 14 to 16, 2005 at the Gaylord Texan Hotel in Grapevine, Texas (halfway between Dallas and Fort Worth). SAVE THE DATE!
- Charlotte, NC: The Charlotte, NC Estate Planning Council announced it 2004-2005 program schedule that includes Ron Aucutt , from Washington DC area providing a legislative update in January 2005; and John Porter of Houston, Texas discussing Family Limited Partnerships.
- Seattle, WA: The Estate Planning Council of Seattle along with the Washington CEO Magazine sponsored a CEO Roundtable that will be covered in the November, 2004 issue. The Roundtable looked at the planning "opportunities" and challenges presented by the uncertainties in federal and state estate tax laws, the people issues that impact the planning of one's estate and family business succession issues. Find out more at:

http://www.epcseattle.org

Benefits of Council Membership in the NAEPC

Local Council membership in the NAEPC brings many benefits of membership including (1) a contact with the National organization to facilitate the exchange of ideas and information between councils, (2) discounts for the Leimberg Newsletter services, (3) discounted subscriptions for Trusts and Estates magazine, (4) discounted subscriptions to the Kettley estate planning software products, and (5) information on public relations efforts plans. Find out more:

http://www.naepc.org/member_services.web



Come to ATLANTA for the 41st Annual Conference

GET READY FOR THE

2005 NAEPC 42nd ANNUALCONFERENCE

Save the Date!

42ND Annual Conference

September 14-16, 2005

Grapevine, Texas

(Halfway between Dallas and Fort Worth)

Co-hosted by the Estate Planning Council of North Texas

Do You Need a Book for your Clients?

"Estate Planning, 5th Ed"

The NAEPC through the Estate Planning Council of Seattle can provide you with three estate planning booklets for your clients, including Estate Planning, 5th Edition; The Fiduciary's Handbook, 2nd Edition, and Dealing with the Death of A Loved One. Members of the EPC of Seattle wrote the booklets from the State of Washington perspective (a community property state), but is designed to provide background to clients to facilitate the estate planning process so it could still be useful for you clients and facilitate the estate planning process. If you would like to purchase the booklets please contact the Estate Planning Council of Seattle directly at (206) 285-4066 or visit : http://www.epcseattle.org/public_purchasepublication.php

To remove your name from our mailing list, please "reply " to this e-mail write "unsubscribe".

Questions or comments? E-mail us at admin@naepc.org or call (866) 226-2224

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WELCOME TO THE NAEPC ANNUAL CONFERENCE NEWSLETTER, cont.

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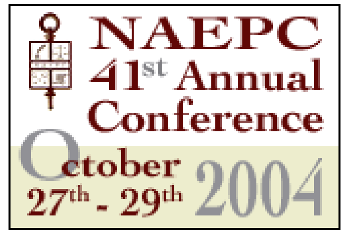

Come to ATLANTA for the 41st Annual Conference

Continued from page 1: There are also many other excellent speakers and topics.

Council Leadership Day, October, 27, 2004 at the Annual Conference will include:

- The NAEPC Annual Meeting
- Leadership Roundtables
- Council Leadership Sharing Sessions
- Local Council Success Stories

Very truly yours,

A. Stephen McDaniel, President, National Association of Estate Planners and Councils

GET READY FOR THE

2005 NAEPC 42nd ANNUALCONFERENCE

Save the Date!!!!

42ND Annual Conference

September 14-16, 2005

Grapevine, Texas

(Dallas/Fort-Worth Area)

Benefits of Council Membership in the NAEPC: the Local Council-National Connection

Local Council membership in the NAEPC brings many benefits of membership including a contact with the National organization to facilitate the exchange of ideas and information between councils across the nation.

- ◊ Do you need speakers for your meetings?
- ◊ Do you need ideas on running a conference?
- ◊ What does it take to co-sponsor the NAEPC Annual Conference?
- ◊ What are some good topics to have covered at a meeting or conference?

Contact the NAEPC office or the NAEPC Board Member that serves your area of the country for any assistance that you need. We are there for you.

See Page 5 for our Officers and Board Members and the states that they represent.

"Please forward this e-mail newsletter to your council officers, directors and your estate planning members." Thanks, Steve McDaniel, President, NAEPC.

"Let us know what we can do for you! Check in with your NAEPC contacts" See Page 5.

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Benefits of Council Membership in the NAEPC: the Local Council-National Connection, continued

Contact the NAEPC office or the NAEPC Board Member that serves your area of the country. Our Directors are:

States:	Officer/Director:
MN, ND, WI	◊ Robert G. Alexander, JD, LLM, AEP, EPLS, Wauwatosa WI, (414) 476-5020; bob@alexander-klemmer.com
WA, OR, AK, ID	◊ William F. (Bill) Super, CPA, MS, RIA, Bellevue, WA (425) 450-0585 ext. 205; bill@mcivorsuper.com
MA, CT, RI	◊ Treasurer Carol E. Tully, JD, CPA, Boston, MA (617) 428-5450 ctully@wolfandco.com
CA	◊ Immediate Past President Jack Rittenhouse, CLU, ChFC, AEP, Santa Rosa, CA, (707)539-5535 jinsuritt@aol.com
CA	◊ Robert E. Burton, CLU, ChFC, LLB, AEP, Alameda, CA (510) 748-5333, bburton@silvergroup.com
IN, MI, OH	◊ Linda M. Olejko, CFP Beachwood, OH (216) 514-7876, linda_olejko@glenmede.com
LA, MS,	◊ Kevin M. Neyrey, CPA/PFS, CVA, New Orleans, Louisiana, (504)486-7275 kneyrey@ericksenkrentel.com
DE, PA, OH, MI, IN	◊ Geoffrey M. Rogers, TO, AEP, Wilmington, DE, (302) 661-4554, geoff.rogers@glenmede.com
GA	◊ John J. Scroggin, JD, LLM, AEP, Roswell, GA, (770) 640-1101, john@scrogginlaw.com
NY, NJ	◊ Leonard H. Neiman, CLU, ChFC, AEP, NY, NY, (212) 996-1111, lneiman265@aol.com
HI, KY, VA, WV	◊ President A. Stephen McDaniel, JD, AEP, EPLS, Memphis, TN, (901) 767-8200, smcdaniel@wmww.com
NC, SC	◊ Vice President C. Barry McCrory, JD, Charlotte, NC, (704) 386-7693, barry.mccrory@bankofamerica.com
AZ, NV, NM, UT	◊ Robert P. Goodman, CPA, AEP, Phoenix, AZ, (602) 776-6311, rgoodcpa@pkcpa.com
IL, IA, KS, MO	◊ Secretary Gary L. Flotron, MBA, CLU, ChFC, AEP, St. Louis, MO, (314) 993-5430, glfclu@aol.com
TX, OK,	◊ Michael Wald, JD, AEP, Richardson, TX, (972) 690-9700, mwald@waldlaw.com
TX, OK,	◊ President-Elect Dan H. Florence, JD, CTFA, AEP, Dallas, TX, (214) 863-6377, danflorence@anbtx.com
CO, MT, NE, SD, WY	◊ Director Emeritus Hartman Axley, CLU, ChFC, JD, CFP, MSFS, RHU, AEP, Denver, CO (303) 985-7922, hartaxley@yahoo.com
FL	◊ Kathleen J. Belmonte, CTFA, AEP, Tampa, FL, (813) 225-8588, kathleen.belmonte@bankofamerica.com
FL	◊ Michael W. Halloran, ChFC, CFP, AEP, CLU, REBC, RHU, LUTCF, Jacksonville, FL, (904) 356-5155, nmlmike@aol.com
FL	◊ Lawrence Wiener, CLU, ChFC, AEP, Hollywood, FL (954) 986-8688, lwclu@pensioninvestors.com
AL, AR, TN	◊ Walter Lee Davis, Jr., Attorney, CPA, AEP, EPLS, Johnson City, TN, (423) 929-7000, lee@davislaw.net
MD, ME, NH, VT	◊ Joe Falanga, CPA, NY, NY, (212) 372-1341, joseph.v.falanga@aexp.com