

Scan me

61st Annual NAEPC Advanced

Estate Planning Strategies Conference & Council Leadership Conference

October 20 - 24, 2024

Disneyland[®] RESORT Anaheim, CA

REGISTER ONLINE @
[NAEPC.org/conference](https://naepc.org/conference)



Join
LEADERS in
the **ESTATE**
PLANNING
COMMUNITY.

LEADERS in ESTATE PLANNING,

Thank you for your membership, support, and work with the National Association of Estate Planners and Councils (NAEPC) in promoting excellence in estate planning. Together, NAEPC, affiliated councils, our Accredited Estate Planner® designees, Estate Planning Law Specialist certificant, and individual council members, create an exceptionally strong network of multi-disciplinary professionals who share an understanding of the importance of collaboration, lifelong learning, and the significance of meaningful professional relationships to better serve our clients. Where better to take a few days to focus on these three topics than at the 61st Annual NAEPC Advanced Estate Planning Strategies Conference & Council Leadership Conference at the "Happiest Place on Earth", Disneyland® Resort, in Anaheim, California?

This conference has been created and is hosted for **every estate planning professional** regardless of their designation(s). We'll focus first on the educational portion of the program, which is available to anyone within the profession of estate planning, regardless of membership status within a local Estate Planning Council. Following, we'll host the Council Leadership Conference (formerly known as "Council Leadership Day") where leaders from councils around the country convene with peers to learn best practices to maintain and create a thriving local council. These sessions are limited to individuals currently serving as volunteer board members or staff executive / administrator for a local council. By picking up this brochure you're already halfway there...don't wait, register today!

A heartfelt thank you for all the generous continuing and new sponsors who make it possible for NAEPC to offer this valuable conference, some of which are shown below. Be sure to remember these resources throughout the year.

NAEPC staff and volunteers are excited to welcome **LEADERS** in **ESTATE PLANNING** to Disneyland® Resort in Anaheim from October 20 - 24, 2024.

Kit Mac Nee,
CFP®, CRPC®, CSPG, AEP®, QPFC
2024 President

Bronwyn L. Martin,
MBA, ChFC®, CLU®, CLTC®, CRPC®, CFS®, CMFC®, AEP®, LACP, AIF®
61st Annual Conference Chairperson

61st Annual NAEPC Advanced Estate Planning Strategies Conference PREMIER SPONSORS



PRESENTERS

Edward J. Beckwith, JD, LL.M.
Baker Hostetler
Washington, DC

Jocelyn Margolin Borowsky,
JD, LL.M. (taxation)
Duane Morris LLP
Wilmington, DE

April Caudill, JD, CLU®, ChFC®,
AEP® (Distinguished) Nominee
Principal Financial Group
Cincinnati, OH

Joan K. Crain, CFP®, TEP,
AEP® (Distinguished)
J. Crain Consulting
The Villages, FL

Samuel A. Donaldson, JD, LL.M.,
AEP® (Distinguished)
Georgia State University
College of Law
Atlanta, GA

Forest J. Dorkowski, JD,
LL.M. (taxation)
St. Jude Children's Research
Hospital / ALSAC
Memphis, TN

Elizabeth R. Glasgow, JD, LL.M.
McDermott Will & Emery
Los Angeles, CA

Paul R. Greenwood, JD, LL.B.
Greenwood Law Corporation
Escondido, CA

Peter M. Hershon,
CLU®, ChFC®
Coventry
Washington, PA

John P. Hussman, Ph.D.
Hussman Funds

Elizabeth King, JD, LL.M.
Brown Brothers Harriman
Trust Company
Wilmington, DE

Jeffrey K. Lambert
LHT Consulting Group
Houston, TX

Stephanie Loomis-Price, JD,
AEP® (Distinguished)
Perkins Coie LLP
Seattle, WA

Briana Loughlin, JD
Perkins Coie LLP
Seattle, WA

Kyle C. Martin
Internal Revenue Service
Oakland, CA

Justin T. Miller, JD, LL.M.
(taxation), TEP, AEP®, CFP®
Evercore Wealth
Management, LLC
San Francisco, CA

Ferdinando L. Mirarchi, DO,
FAAEM, FACEP
MIDEO Health
Erie, PA

Richard W. Nenzo,
JD, AEP® (Distinguished)
Young Conaway Stargatt &
Taylor, LLP
Wilmington, DE

Nancy B. Rapoport, JD
William S. Boyd School of Law,
UNLV
Las Vegas, NV

Susan P. Rounds, JD, CPA,
LL.M. (taxation), TEP,
AEP® (Distinguished)
Deutsche Bank Trust
Company, N.A.
Los Angeles, CA

Vincent C. Thomas
Young Conaway Stargatt &
Taylor, LLP
Wilmington, DE

Wes Turiano
CW Mineral Group
Tulsa, OK

Jennifer Van Duzer
Van Duzer Law
Culver City, CA

The Accredited Estate Planner®
designation signifies to colleagues and
clients alike that you practice the team
concept of estate planning. Learn more
about the program at [NAEPC.org/AEP](https://naepc.org/AEP).



SUNDAY, OCTOBER 20, 2024

All times Pacific Time

10:00 am - 7:00 pm

Registration Open for Exhibitors, Annual Conference Attendees, Monday Single-Day Passholders, and Annual Conference Attendees with Council Leadership Conference Pass

3:00 pm - 4:00 pm

NAEPC Past President's Council Meeting (invitation only)

4:00 pm - 5:00 pm

VIP Reception with Exhibitors for NAEPC Board, Past Presidents & Council Leaders



5:00 pm - 7:00 pm

Kick-Off Welcome Reception for All Attendees with Exhibitors

MONDAY, OCTOBER 21, 2024

6:00 am - 6:30 am

Michael W. Halloran 2-Mile Fun Run & Walk

7:00 am - 8:00 am

Breakfast with Exhibitors

7:15 am - 7:45 am

Sponsored Workshop

Family Funeral Readiness - A Real-Life Case Study

Jeffrey K. Lambert

Offered by LHT Consulting Group

8:00 am - 8:30 am

Conference Opening Remarks & NAEPC 2024 Annual Meeting

8:30 am - 9:30 am

Federal Tax Update

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

9:30 am - 10:00 am

Break with Exhibitors

10:00 am - 11:00 am

Patient Safety Concerns with Living Wills & Advance Directives

Ferdinando L. Mirarchi, DO, FAAEM, FACEP

11:00 am - 12:00 pm

Family Business Succession Planning After Connelly: Legal and Practical Considerations

April Caudill, JD, CLU®, ChFC®, AEP® (Distinguished) Nominee

12:00 pm - 1:30 pm

Lunch with Exhibitors

1:30 pm – 2:30 pm

Estate Planning for the Exemption Adjacent Family
Elizabeth R. Glasgow, JD, LL.M. & Jennifer Van Duzer

2:30 pm – 3:30 pm

The Essential Charitable Planner
Edward J. Beckwith, JD, LL.M.

3:30 pm – 4:00 pm

Break with Exhibitors

4:00 pm – 5:00 pm

Nowhere to Run, Nowhere to Hide – the Corporate Transparency Act and Modern Trust Planning
Jocelyn Margolin Borowsky, JD, LL.M. (taxation) & Elizabeth King, JD, LL.M.

5:00 pm – 6:30 pm

Attendee Reception with Exhibitors



Honors, Awards, and Accolades

Robert E. Fox, CLU®, AEP® Volunteer Service Award

Recognizing exceptional volunteer service to an estate planning council, a local community, or to NAEPC during the prior year.

2023 Recipients: William F. Super, CPA, RIA, MS-TAX, AEP®, PFS
Stuart D. Zimring, JD

2024 Recipients: Jerry D. Coats, CLU®, ChFC®, AEP®, CAP®
Kathryn H. Garlow, CPA, JD

NAEPC Estate Planning Hall of Fame®

Offered in recognition of distinguished service to the profession of estate planning.

2024 Inductees: Farhad Aghdami, JD, LL.M. (taxation)
April Caudill, JD, CLU®, ChFC®, AEP®
Amy K. Kanyuk, JD, MBA
Robert H. Sitkoff, JD
Suzanne Brown Walsh, JD

Hartman Axley Lifetime Service Award

Honoring those who have been highly active in the estate planning community and crucial to the development of NAEPC.

2024 Recipient: Clark B. McCleary, CLU®, ChFC®, MSFS, AEP® (Distinguished)

7:00 am - 8:00 am

Breakfast with Exhibitors

7:15 am - 7:45 am

Sponsored Workshop

Charitable Giving through Individual Retirement Accounts

Forest J. Dorkowski, JD, LL.M. (taxation)

Offered by St. Jude Children's Research Hospital / ALSAC

8:00 am - 8:25 am

Daily Remarks and Presentation of Robert E. Fox, CLU®, AEP® Volunteer &

Hartman Axley Lifetime Service Awards

8:25 am - 9:25 am

Strategic Allocation: Long-term Investment Planning that Reflects Changing Market Conditions

John P. Hussman, Ph.D.

9:25 am - 10:00 am

Break with Exhibitors

10:00 am - 11:00 am

The Secondary Market for Life Insurance: Current Trends, New Applications

Peter M. Hershon, CLU®, ChFC®

11:00 am - 12:00 pm

Estate Planning Paralysis: Getting Your Clients to Act

Justin T. Miller, JD, LL.M. (taxation), TEP, AEP®, CFP®

12:00 pm - 1:00 pm

Lunch with Exhibitors

1:00 pm - 2:00 pm

Litigator's Lessons Learned

Stephanie Loomis-Price, JD, AEP® (Distinguished) & Briana Loughlin, JD

2:00 pm - 3:00 pm

State Income Taxation of Trusts: California, New York, and Beyond

Richard W. Nenno, JD, AEP® (Distinguished) & Vincent C. Thomas

3:00 pm - 3:30 pm

Break with Exhibitors / Exhibit Hall Closes

3:30 pm - 4:30 pm

Recent Developments in Cross Border Planning: Offshore Trusts and Expatriation: Solutions or Illusions?

Joan K. Crain, CFP®, TEP, AEP® (Distinguished)

4:30 pm - 5:30 pm

What Every Estate Planner Needs to Know About Spotting Red Flags of Elder Financial Exploitation;
and What To Do When Recognizing Those Signs

Paul R. Greenwood, JD, LL.B.

6:00 pm

President's Reception (invitation only)

REGISTER
HERE



Scan me

7:00 am - 8:00 am

Breakfast

Concurrent Breakfast: Accredited Estate Planner® Designation from A - Z
(sign up to learn more about the AEP® designation)

8:00 am - 8:10 am

Daily Remarks

8:10 am - 9:10 am

Artificial Intelligence: Benefits and Ethical Pitfalls
Nancy B. Rapoport, JD

9:10 am - 9:45 am

NAEPC Estate Planning Hall of Fame® Induction Ceremony

9:45 am - 10:25 am

Break

10:25 am - 11:25 am

A View from Both Sides of the Table: Avoiding Planning Pitfalls that May Trigger Compliance Issues
Kyle C. Martin & Susan P. Rounds, JD, CPA, LL.M. (taxation), TEP, AEP® (Distinguished)

11:25 am - 12:25 pm

Oil & Gas Assets; Estate and Gift Planning Opportunities and Challenges
Wes Turiano

12:25 pm - 12:30 pm

Closing Remarks

12:30 pm - 1:30 pm

Annual Conference Closing Luncheon

Concurrent Private Luncheon for Accredited Estate Planner® Designees:
Ethical Issues in Estate Planning - Julie Ragatz, Ph.D.



WEDNESDAY, OCTOBER 23, 2024

All times Pacific Time

8:00 am – 12:30 pm

Council Staff Executive / Administrator Breakfast & Session



12:30 pm – 1:30 pm

Lunch for All Council Leadership Conference Attendees

Concurrent Private Luncheon for AEP® Designees

2:00 pm – 3:45 pm

Learning Pods #1, #2 & Conversation Break

3:45 pm – 5:00 pm

Council by Size Session #1 (membership topics)

5:00 pm – 7:00 pm

Annual Awards Reception: Council of Excellence, 5-Star Council & Emerging Council Awards

6:30 pm

Council Staff Executive / Administrator Private Dinner



INVEST IN YOUR COUNCIL

The Council Leadership Conference is the best way to learn about what other councils are doing, where they have found success, and how they have overcome struggles in the post-pandemic world.

NAEPC recommends sending at least one leader at the vice-president level or below and the council's staff executive / administrator (staff registration is complimentary).



THURSDAY, OCTOBER 24, 2024

7:00 am – 8:00 am

Breakfast with Fellow Council Leaders

8:00 am – 9:35 am

Private Council Staff Executive / Administrator Session with Webmaster



8:00 am – 10:45 am

Learning Pods #3, #4, #5 & Conversation Break

10:45 am – 12:00 pm

Council by Size Session #2 (non-membership topics)

12:00 pm

Council Leadership Conference Ends



Meetings & Events

- Crafting Events with Broad Appeal & Creating Compelling Meeting Announcements
- Hot Speakers & Topics

Human Capital

- Help! Our Board, it's BORED!
- Board Nomination Process
- Inspiring Volunteerism

Operations

- Creating a Sponsorship Program
- Diversity, Equity, and Inclusion & its Impact on Your Council
- Effective Writing & its Benefit to your Council
- Implementing an Accredited Estate Planner® Designation Council Nomination Program
- Operations Checklist
- In-Person vs. Virtual: What is Best?
- Leveraging Committees

Membership

- Best Practices in Welcoming New Members
- The Ultimate Conversion: Helping Guests Become Members
- Creating a Member Milestone Program & Service / Achievement Awards
- Engaged Members: How to Get Em' & How to Keep Em'
- Setting Your Council Apart: Honing in its Value Proposition and Benefits of Membership

Learning Pod Topics

Technology

- Making the Most of your Council's NAEPC-Hosted Website
- NAEPC National Website Tour & Review
- A Social Media Action Plan

REGISTRATION

	Before 08/13/24	08/13/24 - 09/24/24	After 09/24/24
Advanced Estate Planning Strategies Conference with Council Leadership Conference Pass	\$1,425	\$1,475	\$1,525
Advanced Estate Planning Strategies Conference			
Member	\$1,325	\$1,375	\$1,425
Non-Member	\$1,550	\$1,600	\$1,650
Monday or Tuesday Educational Day Pass			
Member	\$545	\$595	\$645
Non-Member	\$620	\$670	\$720
Wednesday Educational Half-Day Pass			
Member	\$395	\$445	\$495
Non-Member	\$445	\$495	\$545
Council Leadership Conference Pass	\$270	\$320	\$370

DISCOUNTS

\$50 AEP® Designee or EPLS Certificatant
\$50 Member of Any Council in California
\$100 NAEPC Volunteer (currently serving on a committee)

[REGISTER ONLINE AT NAEPC.org/conference](https://naepc.org/conference)

Cancellation / Transfer: A request for a cancellation / transfer must be received via email to conference@naepc.org. A full refund for a cancellation will be granted if notice is received on or before 09/20/24. Those who cancel between 09/21/24 and 10/04/24 will forfeit a \$200 administrative fee. No refunds will be granted after 10/04/24 for any reason; requests to transfer registration to another individual will be accommodated.

CONTINUING EDUCATION CREDIT

The following credit will be requested in all states: **legal, accounting, CFP®, CTFA, EA and PRP** (formerly PACE) including one hour of ethics credit, where applicable, starting 10/21/24 and going through 10/23/24 at 12:25 pm as follows.

Full Conference Attendance - Up to 16 Hours

The program will not be filed for insurance or legal specialization credit. Individual states and governing bodies, coupled with your attendance and participation in attendance tracking, determine the total number of hours and type of credit awarded. License numbers are required on-site to receive credit. Approval status will be communicated on our website approximately six weeks pre-conference.

Continuing education credit is administered by our partner, the [National Association of Insurance and Financial Advisors \(NAIFA\)](https://naifa.org).



HOST RESORT & LODGING

We are excited to experience the magic at Disneyland® Resort for the 61st Annual Conference. Become immersed in the spirit of Disneyland® past and present. Guestrooms at the Disneyland® Resort are sophisticated while still whimsical, paying loving tribute to the classic years of Disneyland® Park. Upscale styling, state-of-the-art amenities, and special Disney® furnishings provide a stay that you or your entire family will treasure. With easy access to the Downtown Disney® District and theme parks, you'll have plenty of choices for evening adventures.

The NAEPC room rate is \$289 (single / double occupancy) plus applicable taxes and fees. Reservations for overnight accommodations should be made by 09/20/24 by using the online reservation link: <https://www.mydisneygroup.com/GDNK24A>.

Please contact the NAEPC office if you experience any trouble during the booking process.

SOCIAL REGISTRANTS & GUESTS

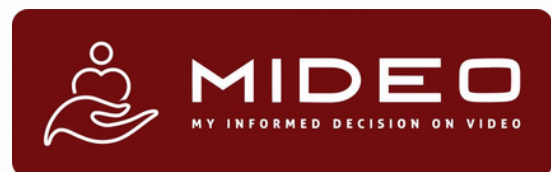
A Social Registrant package is available that includes all conference breakfasts and receptions. Please make sure to share the name and full contact details of conference companions at the time of registration so we can communicate directly with them about conference events. **Please note: meal and social functions are not available to unregistered companions.**

EXPERIENCE DISNEYLAND® AND BEYOND

Make your stay magical with a trip to Disneyland® Park and Disney California Adventure® Park! Specially priced theme park tickets can be purchased HERE. Or explore the surrounding area by letting Visit Anaheim and nearby Visit Newport Beach help! These two organizations have all the information you need to plan an exciting trip.

61st Annual NAEPC Advanced Estate Planning Strategies Conference

PREMIER SPONSORS



President

Kit Mac Nee, CFP®, CRPC®, CSPG, AEP®, QPFC
Morgan Stanley
Los Angeles, CA

President-Elect

Lawrence J. Macklin, Esq., CPA, AEP®
Baltimore, MD

Treasurer

David Green, CPA/PFS, CFP®, AEP®
David Green CPA PLLC
Spokane, WA

Secretary

Michael P. Panebianco, JD, LL.M. (taxation), AEP®
McDonald & Kanyuk, PLLC
Concord, NH

Immediate Past President

John T. Midgett, JD, AEP®
Midgett-Preti-Olansen PC
Virginia Beach, VA

Lawrence K. Bogar, AEP®, AWMA®, ChFC®,
AAMS®, LUTCF
Bogar L K Financial, LLC
Montclair, NJ

Remy Carpenter, JD, LL.M. (taxation), AEP®
Northern Trust
Phoenix, AZ

Paul M. Caspersen, CFP®, MS
(Financial Planning & Taxation), AEP®
Planned Giving Interactive, LLC
Gainesville, FL

Monique Lavender Greenberg, JD, LL.M. (estate planning),
AEP®, Board Certified in Wills, Trusts & Estates
Lavender Greenberg PLLC
Coral Gables, FL

Thomas M. Griffith, ChFC®, CAP®, AEP®
Central New York Community Foundation
Syracuse, NY

Harvey A. Hutchinson III, MBA, M.Acc., JD,
LL.M. (taxation), CFP®, AEP®
CeriFi | Money Education
Alpharetta, AL

VOLUNTEER WITH NAEPC

We are always looking to expand our volunteer base and encourage designees, council leaders and members to get involved by serving as a committee member. [LEARN MORE](#)

Karly A. Laughlin, CPA, AEP®
Belfint, Lyons & Shuman, P.A.
Wilmington, DE

Bronwyn L. Martin, MBA, ChFC®, CLU®, CLTC®, CRPC®,
CFS®, CMFC®, AEP®, LACP, AIF®
Martin's Financial Consulting Group, Ameriprise Financial
Kennett Square, PA

Mavis N. McKenley, CTFA, AEP®, CFP®
AMG National Trust
Virginia Beach, VA

Ginger Fuller Mlakar, JD, CPA, AEP®
Cleveland Foundation
Cleveland, OH

Sahar Pouyanrad, EMBA, AEP®, CTFA, CEP®, ChSNC®
JP Morgan Private Bank
Los Angeles, CA

Juan C. Ros, CFP®, CSPG, MBA, AEP®, CEPA®, CVGA
Forum Financial Management, LP
Thousand Oaks, CA

Director Emeritus

Martin M. Shenkman, CPA/PFS, MBA, JD, AEP® (Distinguished)
Shenkman Law
Manhasset, NY

Susan J. Travis, CFP®, CTFA, AEP®
Mercer Advisors/Kanaly Trust
Houston, TX

Rachel L. Votto, CPA, AEP®
BDG - CPAs
Ridgewood, NJ

April D. Wise, JD, AEP®
Balch & Bingham, LLP
Montgomery, AL



Conference Chairperson

Bronwyn L. Martin, MBA, ChFC®, CLU®, CLTC®, CRPC®, CFS®, CMFC®, AEP®, LACP, AIF®
 Martin's Financial Consulting Group,
 Ameriprise Financial
 Kennett Square, PA

Conference Vice-Chair

Robert J. Ruelle, CLU®, ChFC®, CASL®, MSFS, FLMI, REBC®, RHU®, AEP®
 Heckmann Financial
 Richfield, WI

Jennifer L. Alfieri, JD, AEP®
 Tompkins Community Bank /
 Tompkins Financial Advisors
 Fayetteville, NY

S. Mark Alton, CFP®, ChFC®, CLU®, CAP®, AEP®, MSFS, CPWA®* **
 Morgan Stanley Wealth Management
 Syracuse, NY

Susan J. Burkenstock, JD, AEP®
 Elkins, PLC
 New Orleans, LA

Julie A. Buschman, CPA, AEP®, CAP®* **
 Northern Trust
 Dallas, TX

Remy Carpenter, JD, LL.M. (taxation), AEP®
 Northern Trust
 Phoenix, AZ

M. Eileen Dougherty, CTFA, CFP®, AEP®, ChFC®**
 Warminster, PA

Joseph V. Falanga, CPA, AEP®, TEP**
 U H Y Advisors NY, Inc.
 New York, NY

John P. Garniewski, Jr., CPA/PFS, CFP®, AEP®**
 Family Office Solutions LLC
 Wilmington, DE

Jeffrey Richard Hoenle, CFP®, CRPC®, AEP®
 Platinum Wealth Management Group, Inc.
 Sterling Heights, MI

Richard K. MacBarron, JD, CFP®, ChFC®, CLU®, CBEC®, AEP®*
 Sagemark Consulting
 Irvine, CA

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

Erin E. Markham, CTFA, TEP, AEP®
 The Goldman Sachs Trust Company
 Wilmington, DE

Ginger Fuller Mlakar, JD, CPA, AEP®
 Cleveland Foundation
 Cleveland, OH

Michael P. Panebianco, JD, LL.M. (taxation), AEP®
 McDonald & Kanyuk, PLLC
 Concord, NH

Jordon N. Rosen, CPA, MST, AEP® (Distinguished)* **
 Wilmington, DE

Judith A. Saxe, JD, AEP®, CAP®
 CIBC Private Wealth Management
 Boston, MA

William F. Super, CPA, RIA, MS-TAX, AEP®, PFS
 William Super CPAs & Consultants
 Fallbrook, CA

Susan J. Travis, CFP®, CTFA, AEP®
 Mercer Advisors/Kanaly Trust
 Houston, TX

Caryn R. West, JD, AEP®
 Parks Zeigler, PLLC
 Virginia Beach, VA

* Past Conference Chairperson

** Past President of NAEPC

61st Annual NAEPC Advanced Estate Planning Strategies Conference
 PREMIER SPONSORS



61st Annual NAEPC

Advanced Estate Planning Strategies Conference & Council Leadership Conference

October 20 - 24, 2024

Anaheim, California · Disneyland® Resort

TEN REASONS TO ATTEND

- 1) Nationally recognized speakers
- 2) **COLLABORATE** on cutting-edge ideas and trends
- 3) Advanced topics of interest to **EDUCATE** every member of every estate planning council and all estate planning professionals: attorneys, trust professionals, accountants, philanthropic professionals, elder law specialists, wealth management professionals, insurance and financial planning professionals
- 4) An intimate setting that provides ample time to **CULTIVATE** relationships with speakers and other attendees
- 5) Multi-disciplinary continuing education credit
- 6) Content will address a wide-range of today's most important tax and non-tax issues, providing practical guidance on planning effectively in today's environment
- 7) Join **LEADERS** in the **ESTATE PLANNING** community for exceptional education and engaging conversation
- 8) Access to conference supporters and NAEPC member benefit providers, along with special bonus workshops
- 9) **CELEBRATE 61 YEARS OF EDUCATIONAL EXCELLENCE IN ESTATE PLANNING**
- 10) **Disneyland®!**

LEARN MORE & REGISTER

[NAEPC.org/conference](https://naepc.org/conference)

