

The NAEPC Education Foundation *and*  
National Association of Estate Planners & Councils

# 48<sup>th</sup> Annual Conference

## November 16 – 18, 2011

San Antonio, Texas ~ Marriott Rivercenter Hotel

**November 16, 2011**  
*sessions begin at 7:30 am*

### Council Leadership Day

This day of activities is designed as a leadership sharing session for volunteers at the affiliated local council level, including NAEPC's annual business meeting, updates on benefits and programs & services available to affiliated local councils. Additional sessions are devoted to private, volunteer-led discussion groups for leaders from councils of like-size. The day concludes with the conference welcome reception for all registered attendees and companions.

### Companion Program

Day Trip to Fredericksburg, Texas and the Hill Country

Continuing education credit will be available nationwide for estate planning-related disciplines to those that attend the Thursday & Friday technical education sessions (*pending approval by governing bodies*).

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

**November 17, 2011**  
*sessions begin at 7:00 am*

**2nd Annual**  
*6:00 am Fun Run & Walk*

### Technical Education Day 1

Robert S. Keebler, CPA, MST, AEP®  
(Distinguished)  
*Retirement Planning Under the New Tax Law*

Samuel A. Donaldson, JD, LL.M., AEP®  
(Distinguished)  
*Burning Questions (and Even Hotter Answers) About Grantor Trusts*

Steven J. Oshins, JD, AEP®  
(Distinguished)  
*The Domestic Asset Protection Trust: Combining it with the Double LLC*

Jeffrey N. Pennell, JD  
*An All-Purpose Program for the Estate Planning Advisor*

Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP®  
*Elder Law and Special Needs Planning*

**Breakout Session** ~ Todd A. Fithian, CLU®, ChFC®  
*Let Their Values Be Your Guide - How the Softer Side of Planning Drives Implementation and Doesn't Require a PhD in Psychology*

**Breakout Session** ~ Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP®  
*Elder Law and Special Needs Planning, a Closer Look Including Case Studies*

**Breakout Session** ~ Steven J. Oshins, JD, AEP® (Distinguished) & Gideon Rothschild, JD, CPA, AEP® (Distinguished)  
*Asset Protection*

*November 17, 2011, continued*

Companion Program  
Spotlighting the Missions

**November 18, 2011**  
*sessions begin at 7:00 am*

### Technical Education Day 2

Todd A. Fithian, CLU®, ChFC®  
*How to Implement Everything You've Learned at this Conference!*

Donald O. Jansen, JD, LL.M.  
*Life Insurance Use in Business*

Steve R. Akers, JD, AEP®  
(Distinguished)  
*New Planning Paradigms Under the Tax Relief Act of 2010*

David Casarett, MD, MA  
*Last Acts*

Gideon Rothschild, JD, CPA, AEP®  
(Distinguished)  
*Flexible Trust Drafting and Fixing Irrevocable Trusts*

S. Stacy Eastland, JD, AEP®  
(Distinguished)  
*Some of the Best Estate Planning Ideas We See Out There (That Also Have the Merit of Playing Havoc with Certain "Conventional Wisdom")*

Companion Program  
A Visit to Historic Gruene, Texas

**November 19, 2011**  
*day will end no later than 3:00 pm*

### Volunteer Experience

Land Heritage Institute  
([www.landheritageinstitute.org](http://www.landheritageinstitute.org))

### Lodging Information

The conference is headquartered at the **Marriott Rivercenter**. The magnificent 38-story hotel is conveniently located on the San Antonio River Walk near many great activities, including shopping at the Rivercenter Mall and the cultural and historical landmarks of San Antonio.

A block of rooms has been reserved for conference attendees with a special rate of \$189/night (single / double) plus applicable taxes. The room rate includes complimentary “Wired for Business” service in guestrooms and a 50% discount on self parking rates. Reservations must be made by 10/14/11 to guarantee the group rate. To reserve, visit the “conferences” page of [www.naepc.org](http://www.naepc.org) or by calling Marriott reservations at (800) 364-8064 (reference “NAEPC” to ensure group rate).

### Cancellation Policy

Any cancellation must be received in writing or via e-mail to [conference@naepc.org](mailto:conference@naepc.org). A full refund will be granted if notice is received on or before 09/30/11. Registrants who cancel between 10/01/11 and 10/31/11 will forfeit a \$100 administrative fee. No refunds will be granted on or after 11/01/11.

### Council Discount

Members of the San Antonio Estate Planners Council are offered a \$50 discount on the regular or early bird registration fee (early bird applies to registrations received by 09/30/11).

*When/if 25 members of the council register to attend the event, an additional \$50 will be refunded back to the registrant at the conclusion of the conference.*

No discounts apply to the companion registration packages.

\$50 late fee will be applied to all registrations postmarked on or after 10/14/11.

_____ Last Name	_____ First Name & Middle Initial
_____ Professional Designations	_____ Nickname for Nametag Purposes
_____ Company Name	_____ Street Address
_____ City, State & Zip	_____ Telephone Number
_____ Email Address	_____ Fax Number
_____ <i>San Antonio Estate Planners Council</i>	
_____ Affiliated Local Council Membership	
_____ Companion Last Name, First Name and Nickname	
_____ Companion Street Address, City, State & Zip Code	
_____ Companion Telephone Number	_____ Companion Email Address

**See panel at left for special information for members of the San Antonio Estate Planners Council.**

#### ADDITIONAL SPECIAL DISCOUNT

\$50 discount available to AEP® designees approved after 11/01/10 or any AEP® that has not previously attended an annual conference.

#### ADDITIONAL FEES

\$50 late fee will be applied to all registrations postmarked on or after 10/14/11.

#### **Regular Registration / Early Bird Registration (received by 09/30/11)**

#### **Council Leadership Day Package      \$800 / \$750**

Includes Council Leadership Day sessions and technical education sessions, presentation material, conference breakfasts & luncheons & the Wednesday evening welcome reception.

- I will attend the welcome reception on Wednesday, November 16, 2011  
 I will attend the volunteer event on Saturday, November 19, 2011

#### **Conference Educational Package      \$700 / \$650**

Includes the Wednesday evening welcome reception, technical education sessions, presentation material & conference breakfasts & luncheons.

- I will attend the welcome reception on Wednesday, November 16, 2011  
 I will attend the volunteer event on Saturday, November 19, 2011

#### **3-day Companion Registration Package      \$400**

Includes conference breakfasts, the Wednesday – Friday companion tours & Wednesday welcome reception.

- I will attend the companion tour on Wednesday, November 16, 2011  
 I will attend the welcome reception on Wednesday, November 16, 2011  
 I will attend the companion tour on Thursday, November 17, 2011  
 I will attend the companion tour on Friday, November 18, 2011  
 I will attend the volunteer event on Saturday, November 19, 2011

#### **2-Day Companion Registration Package      \$350**

Includes conference breakfasts, the Thursday – Friday companion tours & Wednesday welcome reception.

- I will attend the welcome reception on Wednesday, November 16, 2011  
 I will attend the companion tour on Thursday, November 17, 2011  
 I will attend the companion tour on Friday, November 18, 2011  
 I will attend the volunteer event on Saturday, November 19, 2011

#### **Fee Computation & Payment Instructions**

Primary Registrant Fee	_____
Less SAEPC discount	<u>    \$50    </u>
Subtotal	_____
Add \$50 late fee if postmarked on or after 10/14/11 - TOTAL	<u>                    </u>

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

\_\_\_\_\_  
Account Number      Exp. Date

\_\_\_\_\_  
Signature