NAEPC
NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS
COLLABORATE · EDUCATE · CULTIVATE

YEARLY NO-CHARGE SPEAKER PROGRAM:

LEARN FROM LEADERS IN THE ESTATE PLANNING COMMUNITY

The “No-Charge” speaker program is one of the most valuable benefits offered by NAEPC. The individuals noted below have agreed to speak (within noted guidelines)… **WITH THEIR HONORARIUM WAIVED**! Each speaker will present an educational topic, speak to the benefits of being a member of NAEPC, and current NAEPC board members may also be available to attend a board meeting to discuss the benefits of NAEPC affiliation in more detail. All are either past presidents, current board members, or past board members of NAEPC. **COUNCILS ARE PERMITTED TO USE ONE WEBINAR IN PLACE OF AN IN-PERSON SPEAKER.** Councils must submit their enrollment/registration form to NAEPC rather than contacting speakers directly.

Please note that programs are not available during the week prior to and of the Annual NAEPC Advanced Estate Planning Strategies Conference held each November, and may be limited near in-person and virtual events, the time leading up to the conference, and during peak professional seasons.

PLEASE NOTE

Details about additional programming resources offered by NAEPC can be found at http://www.naepc.org/affiliated-councils/speakers-bureau.

· Speakers

Paul M. Caspersen, CFP®, AEP®, MS (financial planning & taxation)
Gainesville, FL
current board of directors

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

Al W. King, III, JD, LL.M., AEP® (Distinguished), TEP
New York, NY
past board of directors

Susan P. Rounds, JD, CPA, LL.M. (taxation), AEP® (Distinguished) Nominee, TEP
Los Angeles, CA
past board of directors

Kit Mac Nee, CFP®, CRPC®, AEP®
Los Angeles, CA
current executive committee

Rachel L. Votto, CPA, AEP®
Ridgewood, NJ
current board of directors

Ginger F. Mlakar, JD, CPA, AEP®
Cleveland, OH
current board of directors

Learn more about availability on each speaker’s listing.

Speaker and topic availability subject to change

Paul M. Caspersen, CFP®, MS (Financial Planning & Taxation), AEP®

V IP

Availability
Programs up to 2 hours
Virtual or In-Person Programs (when travel is permitted by his employer)

Topics: The Charitable Planning Guide to the SECURE ACT (1.0 & 2.0); Top Three Ways to use Life Insurance in Charitable Planning

Paul Caspersen brings complex financial thinking to the charitable planning field. As a Certified Financial Planner, Paul has 26 years of financial, estate, and charitable planning experience. Between 2012-2022, he served as Assistant Vice President and Sr. Philanthropic Advisor at the University of Florida, where his Gift Planning team closed $1.25 billion (of the Campaigns $4 billion total) in deferred gifts and outright gifts of complex assets. Prior to his position at the University of Florida, he led the Gift Planning program at Iowa State University. Before specializing in planned giving, Paul spent a decade working in financial services.

Paul is the founder of Planned Giving Interactive (PGI), a charitable planning software & consulting organization. PGI is an affiliate organization to Charitable Solutions LLC, the largest national consulting firm that provides charities with risk management solutions for non-cash donations and charitable gift annuities.

Recent or Upcoming Speeches through the No-charge Speaker Program

Central Arizona EPC (AZ)
Colorado West EPC (CO)
Delaware EPC (DE)
EPC of Central Illiana, Inc. (IN)
EPC of the Emerald Coast (FL)
EPC of Northwest Florida (FL)
EPC of Polk County (FL)
Manatee County EPC (FL)
Montgomery County EPC (PA)
Pinellas County EPC (FL)
Tallahassee Regional EPC (FL)

Al W. King, III, JD, LL.M., AEP® (Distinguished), TEP

Availability
Programs up to 2 hours
Virtual or In-Person Programs (when travel is feasible)

Topics: “Powerful Trust Laws to Combat Future Uncertainties: The Need for Flexibility”; (2) “Everything You Wanted to Know About a Private Family Trust Company”; (3) “The Private Family Trust Company, Directed Trusts and Other Powerful Alternatives"; (4) "U.S. Situs Opportunities for International Families"; (5) "Interesting Trends With Millennials & Trusts"; (6) "Is a Wealth Tax in Our Future"; (7) "The Next Tsunami - Charitable Giving with Non-Charitable Trusts"; (8) Preserving Family Values by Encouraging Social and Fiscal Responsibility with Modern Trust Structures"

Al W. King, III is the co-founder, co-chairman and co-chief executive officer of South Dakota Trust Company LLC and South Dakota Planning Company. With currently more than $135 billion in assets under administration, South Dakota Trust Company offers pure trust administration without any products, working with whomever the client/advisor wishes regarding investments, insurance, and custody. As a result of South Dakota’s unique trust, tax, asset protection and privacy laws, SDTC works with families in 54 countries. SDTC also serves as corporate and/or trust agent for family private trust companies. Mr. King was previously managing director and national director of estate planning for Citigroup as well as the co-founder and vice chairman of Citicorp Trust South Dakota. Mr. King has been inducted into the NAEPC Estate Planning Hall of Fame®. Additionally, Mr. King was previously on the NAEPC board of directors and currently serves on its publication and webinar committees. Mr. King is the Co-Vice Chairman of the editorial board of Trusts and Estates magazine and has been a member for more than 30 years. He is a member of several groups and organizations, including the Society of Trust and Estate Professionals (STEP), the International Association of Advisors in Philanthropy (AiP), New York Philanthropic Advisors Network (NYPAN), Fairfield County and New York City Estate Planning Councils, etc. In addition, he is frequently published, quoted and speaks on the topic of estate and trust planning. Mr. King received a Bachelor of Arts cum laude from Holy Cross College, a Juris Doctor from Syracuse University Law School and an LL.M. in Tax Law from Boston University School of Law. Mr. King is based in New York City/Westport, CT.

Recent or Upcoming Speeches through the No-charge Speaker Program

Bucks County EPC (PA)
EPC of Westchester County (NY)
Northcentral Pennsylvania EPC (PA)
Suncoast EPC (FL)

Kit Mac Nee, CFP®, CRPC®, AEP®
Availability
Programs up to 2 hours
Virtual or In-Person Programs (when travel is permitted by her employer)

Topics: Charitable Remainder Trusts; Behavioral Finance; Social Security; and Protecting Yourself from Identity Theft; Diversity in Estate Planning; 529 Planning: Transferring Millions of Dollars to Your Family; Socially Responsible Investing: Diversity, Inclusion, & Other Issues

We all need accurate information and dependable relationships. That's true no matter what we're looking for, and it's especially true when it comes to financial planning. Kit's clients trust her for two main reasons: They know she cares and they value her experience. This personal-professional combination gives her clients more confidence. We all seek out experts for important parts of our life. It's about more than just money. Her expertise is about conditioning your financial life for strength, health and endurance. Kit joined Morgan Stanley as a Financial Advisor in Pasadena, CA in 2013. Prior to joining Morgan Stanley, she was with Merrill Lynch Wealth Management for nearly nine years.

On her way to becoming a CERTIFIED FINANCIAL PLANNER™, Kit served a community foundation in Southern California as its Director of Gift Planning. She worked with donors and local charitable organizations to gain philanthropic assets that would provide a legacy of financial resources. Today, she uses her financial-planning proficiency to serve as a volunteer, board member, and consultant to guide families and charities toward more secure financial futures.

Kit raised three children, all now grown and leading fulfilling lives in different parts of the United States. She loves traveling to visit family, including trips to Detroit, her original hometown. She lives in Los Angeles and travels throughout Southern California and the U.S. to support clients as well as the community groups she works with. Her volunteer work continues as a board member for the NAEPC and St. Barnabas Senior Services. Kit is a graduate of the University of Minnesota, Carlson School of Management, earned the Certified Specialist in Planned Giving® from California State University Long Beach, American Institute of Philanthropy in 2001, and became a CERTIFIED FINANCIAL PLANNER™ and Accredited Estate Planner® designee in 2013.

Recent or Upcoming Speeches through the No-charge Speaker Program

Amarillo Area EPC (TX)
Central Pennsylvania EPC (PA)
Central Arizona EPC (AZ)
Central Texas EPC (TX)
Colorado West EPC (CO)
Corpus Christi EPC (TX)
Eastern Illinois EPC (IL)
EPC of Central Illiana, Inc. (IN)
EPC of Central New York (NY)
EPC of Chattanooga (TN)
EPC of Diablo Valley (CA)
EPC of Rochester (NY)
EPC of Southeast Denver (CO)
EPC of Tulare-Kings Counties (CA)
EPC of Westchester County (NY)
Eugene EPC (OR)
Fairbanks EPC (AK)
Howard County EPC (MD)
Magic Valley EPC (ID)
Mid-Missouri EPC (MO)
Montgomery County EPC (PA)
Northcentral Pennsylvania EPC (PA)
Northeastern Michigan EPC (MI)
Pinellas County EPC (FL)
Rochester EPC (MN)
San Fernando Valley EPC (CA)
Santa Barbara EPC (CA)
Sioux Falls EPC (SD)
Siouxland EPC, Inc. (IA)
Western Dakota EPC (ND)

Ginger F. Mlakar, JD, CPA, AEP® V IP

Availability
Programs up to 1 hour
Virtual or In-Person Programs (after 01/01/2022 if travel is permitted by her employer)

Topics Covered in 1 Hour Presentation: Role of the Professional Advisor; Landscape of Charitable Giving; Charitable Giving Strategies and Popular Gifting Techniques; Philanthropy Trends and Best Practices; and Legislative Updates

As General Counsel, Ginger Mlakar serves as in-house legal counsel. As VP, Advancement, she oversees the Cleveland Foundation's donor stewardship program that connects donors with their charitable interests. Additionally, she oversees the gift planning program that strategizes on opportunities for prospective donors to achieve their charitable goals. She came to the Cleveland Foundation in July 2009 after 16 years practicing law in the area of estate and charitable gift planning and administration. Her previous positions include partner in the personal succession and planning practice group at Thompson Hine LLP and of counsel in the estate planning and probate practice group at Benesch, Friedlander, Coplan & Aronoff LLP. She is also a certified public accountant.

Ginger has served on the boards of several area organizations, including the Girl Scouts of Lake Erie Council, the Estate Planning Council of Cleveland, the Bay Village Education Foundation, the Bay Village Foundation, the LGBT Community Center of Greater Cleveland, the Cleveland Leadership Center, and as treasurer for the Cleveland Metropolitan Bar Association, Cleveland Metropolitan Bar Foundation, and Bay Soccer Club. She was the president for the Cleveland Metropolitan Bar Foundation. She is currently on the board for the National Association of Estate Planners and Councils and chairs the Accredited Estate Planner® Designation Committee. She has been a member of advisory groups for University Hospitals, the Cleveland Orchestra, and Case Western Reserve University. Additionally, she is an active fellow of the American College of Estate and Trust Council, and an Estate Planning, Trust and Probate Law Council member for the Ohio State Bar Association. Ginger is a frequent speaker on legal and tax issues surrounding charitable giving.

Ginger has been named among the Best Lawyers in America and the Top 50 Female Ohio Super Lawyers List by *Law and Politics* magazine. She was a member of the Leadership Cleveland Class of 2014. Ginger has received the 2022 Women in Professional Excellence from the YWCA of Greater Cleveland, Cleveland Metropolitan Bar Association's Women in Law Making a Difference and President's Awards, the Cleveland Metropolitan Bar Foundation's Outstanding Leadership Award, and the Estate Planning Council of Cleveland's 2019 Distinguished Estate Planner Award. She graduated summa cum laude from The Ohio State University with a Bachelor of Science degree in business administration and earned her juris doctorate from The Ohio State University Moritz College of Law.

Recent or Upcoming Speeches

Boulder County EPC (CO)
Central Arizona EPC (AZ)
Charlotte EPC (FL)
Central Pennsylvania EPC (PA)
EPC of Berks County (PA)
EPC of Cleveland (OH)
EPC of Rochester (NY)
EPC of Northeastern Pennsylvania (PA)
Fairbanks EPC (AK)
F&EPC of Metro Detroit (MI)
Hampton Roads EPC (VA)
Magic Valley EPC (ID)
Sioux Falls EPC (SD)
Southern Arizona EPC (AZ)
Spokane EPC (WA)
Toledo EPC (OH)
Western Dakota EPC (ND)
West River E & FPC (SD)

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

V IP

Availability
Programs 45 – 75 minutes in length
Virtual or In-Person Programs

Topics: Estate Planning for the 99% of Us (including post-mortem elections and filing the final 1040); Multi-Disciplinary Teaming - A Best Practices Approach; Estate Planning - Creating A Legacy of Philanthropy; Year-end Tax Planning for Individuals, Trusts & Small Businesses

With over 43 years of accounting experience, Jordon N. Rosen, CPA, MST, AEP® (Distinguished) is a former Director and shareholder at the Wilmington, Delaware CPA firm of Belfint, Lyons & Shuman, where he headed the firm's estate and trust practice and provided estate, trust and income tax consulting and compliance services to the firm's higher net worth clients and business owners. He also served as Director of Tax Practice Quality Control for the firm, providing oversight of the firm's adherence to its risk management policies.

Mr. Rosen is a past president of the National Association of Estate Planners and Councils (NAEPC), which in 2020 inducted him into the Estate Planning Hall of Fame. He has also served as president of the Delaware Estate Planning Council and the Chester County, PA Estate Planning Council. Mr. Rosen is also the past Chair of the Tax Committee of the Delaware State Chamber of Commerce, is a past member of the AICPA Trust, Estate and Gift Technical Resource Panel and Tax Reform Resource Task Force, as well as a member of the editorial board of Thomson Reuters Focus publication and has served as chairperson of the Nemours Planned Giving Committee.

Jordon is a licensed CPA in Delaware and Pennsylvania and is a member of the Pennsylvania Institute of CPAs, Delaware Society of CPAs and the AICPA Tax Section. He also holds the designation of Accredited Estate Planner and has been recognized as a 5-Star Wealth Manager by *Philadelphia Magazine* and *Delaware Today*.

Mr. Rosen is a frequently sought out speaker both locally and nationally on income, estate and trust tax planning and related issues and has published more than 100 articles. He has been a frequent television and radio guest and a past host of Money Talk on 1450-WILM. He received his undergraduate degree in Accounting from Temple University and his Masters degree in taxation from Widener University.

Estate planning councils affiliated with NAEPC have the special honor of nominating qualified individuals to apply for the Accredited Estate Planner® (AEP®) designation through the "AEP® Council Nomination Program?" A council's participation in this program affirms the multi-disciplinary approach to client service and the core value that brings all members of NAEPC together.

EXCELLENCE IN ESTATE PLANNING

Susan P. Rounds

IP

Availability
Programs up to 3 hours
In-Person Programs Preferred (when travel is permitted by her employer), Virtual

Topics: Business Succession Planning – “Succession by Design – Successful Succession of the Family Business and Wealth”; Family Governance – “Family Dynamics & Intergenerational Conflict: Preserving Family Wealth and Harmony”; Collaboration – “High Performance Teaming & Professional Collaboration”

Susan Rounds I Head US Wealth Planning I Deutsche Bank Wealth Management

Susan works with ultra-high net-worth clients and their families on matters of tax and estate planning, business succession, risk management, philanthropy, family governance and legacy. Teaching highlights include the University of Georgia School of Law and Terry College of Business, the Becker CPA Review Course, and the NYU Summer Institute on Taxation. Susan makes frequent presentations across the country and her articles have been featured in leading publications.

Susan was inducted into the NAEPC Estate Planning Hall of Fame in November 2022.

Professional designations include JD, CPA, LLM, TEP, AEP® (Distinguished) .

Recent or Upcoming Speeches through the No-charge Speaker Program

Birmingham EPC (AL)
Central Arizona EPC (AZ)
Chester County EPC (PA)
Coeur d'Alene EPC (ID)
Colorado West EPC (CO)
EPC of Mobile (AL)
EP & Trust Council of Long Beach (CA)
Eugene EPC (OR)
Fairbanks EPC (AK)
New Mexico EPC (NM)
New Orleans EPC (LA)
Northcentral Pennsylvania EPC (PA)
Northwest Washington EPC (WA)
Palm Beach County EPC (FL)
Red River Valley EPC (ND)
Redwood Empire EPC (CA)
Santa Clara County EPC (CA)
Conejo Valley EPC (CA)
Elkhart County EPC (IN)
EPC of Colorado Springs (CO)
EPC of Eastern New York (NY)
EPC of the Emerald Coast (FL)
Seattle EPC (WA)
Siouxland EPC, Inc. (IA)
Stanislaus County EPC (CA)
Suncoast EPC (FL)
T & EPC of Shreveport (LA)
Wake County EPC (NC)
Walla Walla Valley EPC (WA)
West Broward EPC (FL)
Western Dakota EPC (ND)
West River E&FP Council (SD)
Willamette Valley EPC (OR)

Rachel L. Votto, CPA, AEP®

V IP

Availability
Programs up to 1 hour
Virtual or In-Person Programs (when travel is permitted by her employer)

Topics: Year-End Tax Planning, Overview of New Tax Laws

Rachel Votto is the Tax Partner-in-charge at BDG-CPAs. She has been with the firm for over 20 years and is partner-in-charge of all tax services. Rachel provides comprehensive financial planning to executives and high net worth individuals, including estate planning and working with income tax planning with trusts. She also serves many corporate and partnership clients including closely held businesses to multinational corporations with experience on acquisitions, reorganizations, international, multigenerational planning, multistate structures and complex tax planning strategies to assist clients in maximizing tax savings. She is a member and past president of the Estate Planning Council of Bergen County. She is currently a board member of Family Promise of Bergen County and the NAEPC. She has made various presentations on new tax legislation and other tax topics. Rachel graduated from Villanova University and also holds a Master's Degree in taxation from Pace University.

Recent or Upcoming Speeches through the No-charge Speaker Program

Conejo Valley EPC (CA)
El Paso EPC (TX)
EPC of Arkansas (AR)
EPC of Berks County (PA)
EPC of Central New York (NY)
EPC of Riverside County (CA)
EPC of Rochester (NY)
Greater Huntington EPC (WV)
Mercer County EPC (NJ)
Quad City EPC (IA)
Roanoke Valley EPC (VA)

· How the Program Works

- One presentation or webinar per council is available (September 2023 – August 2024)
- Councils must adhere to the timing restrictions provided by the speaker.
- **Specific presentation dates are accepted at the time of application, but are not guaranteed. NAEPC will work with speaker to gauge his/her/their availability.**
- For live presentations, Council is responsible for speaker's travel and lodging expenses. These expenses may include, but are not limited to: transportation to and from the airport at the speaker's original location or airport parking charges; airfare and baggage charges; overnight accommodations to accommodate flight schedules and speaker preference (generally one or two nights); meals; and taxi, ride-share service, or rental car in the city of the council event.
- All expenses to produce the meeting (print, postage, food, audio-visual, continuing education, virtual delivery platform, etc.) are the sole responsibility of the Council. **Speaker will not be responsible for printing or shipping costs to prepare outlines, presentations, etc.**
- Council must allow speaker minimal time to offer a brief description of the programs and services available to members of the NAEPC and/or to distribute information.
- Council is welcome to invite speakers who are currently on the NAEPC board to attend a board meeting.
- Once awarded, Council agrees to notify the speaker and NAEPC immediately if plans change and the program will not be offered.
- Once awarded, it is the responsibility of the Council to handle all arrangements with the speaker / speaker's representative.
- All presentations will be awarded on a first come, first served basis.

After submitting the final page of this packet via email to eleanor@naepc.org, a representative from the NAEPC will email the council contact with availability for the speaker. If the speaker is available, the council will be supplied and email confirmation that includes contact information for the chosen presenter. The council should then reach out to the speaker to confirm date and time arrangements within two weeks of receipt, or sooner if indicated in the confirmation. Please call Eleanor M. Spuhler at the NAEPC office with any questions.

National Association of Estate Planners & Councils

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Westlake, OH 44145
866-226-2224
admin@naepc.org · www.NAEPC.org

Return this page to
eleanor@naepc.org

· Speaker Request Form

Council Name____

Contact Name____

Contact Position within Council (indicate one): Staff Executive ☐ Officer ☐ Board Member ☐ Other ☐

Contact Phone____________________ Contact Email____

· We would like take advantage of a webinar rather than an in-person presentation and prefer the following program:____

Choice *(select at least one but not all, options recommended)*		**Presentation Date** *(options recommended)*	**Meeting Start and End Time & Time Zone**	**Presentation Length**	**Estimated Attendance**	**Preferred Delivery Method** *(virtual, live, or no preference)*
	Paul M. Caspersen					
	Al W. King, III					
	Kit Mac Nee					
	Ginger F. Mlakar					
	Susan P. Rounds					
	Jordon N. Rosen					
	Rachel L. Votto					

Speaker and topic availability subject to change