



SCAN ME

62nd Annual NAEPC Advanced

# Estate Planning Strategies Conference & Council Leadership Conference

October 19 - 23, 2025

Gaylord National  
Washington, DC

**REGISTER NOW**

[NAEPCCONFERENCE.ORG/REGISTER](https://naepcconference.org/register)

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 certificants, 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.

For over 60 years, the conference has been hosted for **EVERY ESTATE PLANNING PROFESSIONAL** regardless of designation(s), discipline, or status as a council leader! The conference is broken into two parts. First, our focus will be 'sharpening our educational saws', where the curriculum is available to anyone within the profession of estate planning, regardless of membership within a local Estate Planning Council. Second, NAEPC will 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 executives / administrators for a local council. By picking up this brochure you're already halfway there...why 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 each year, some of which are shown below. Be sure to remember to utilize their valuable resources throughout the year.

The NAEPC board of directors and staff team are excited to welcome our organization's members to where tax law and estate planning concepts converge, our nation's capital, Washington, DC from October 19 – 23, 2025.

Lawrence J. (Larry) Macklin, CPA, J.D., AEP®  
2025 President

Robert Ruelle, MBA, ChFC®, CLU®, CLTC®, CRPC®,  
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62nd Annual Conference Chairperson

## 62nd Annual NAEPC Advanced Estate Planning Strategies Conference PARTNER SPONSORS



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AEP® (Distinguished)  
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Thomas A. Tietz, JD  
Martin M. Shenkman, P.C.  
Fort Lee, NJ



## PRIVATE ACCREDITED ESTATE PLANNER® EVENT PRESENTERS



Jedidiah Collins, CFP®  
Former NFL Fullback, Author,  
& Behavioral Coach



James Kirchick  
Journalist & the New York  
Times-bestselling Author



# SUNDAY, OCTOBER 19, 2025

All Times Eastern Time

10:30 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)

4:30 pm - 5:00 pm

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

BONUS EVENT  
FOR COUNCIL  
LEADERS

5:00 pm - 6:30 pm

Kick-Off Reception with Exhibitors for All Attendees

# MONDAY, OCTOBER 20, 2025

All Times Eastern Time

6:00 am - 6:30 am

Fitness Activity, Details to be Determined

7:00 am - 8:00 am

Breakfast with Exhibitors

8:00 am - 8:30 am

Conference Opening Remarks & NAEPC 2025 Annual Meeting

8:30 am - 10:00 am

Federal Tax Update

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

10:00 am - 10:40 am

Break with Exhibitors

10:40 am - 11:40 am

The New Legacy: Strategic Estate Planning with Art & Collectibles

Roberta Kramer

12:00 pm - 1:10 pm

Lunch with Exhibitors





1:10 pm – 2:10 pm

Planning for the 99% of Us: For Estates Under 14 Million Dollars

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

2:25 pm – 3:25 pm

Global Ties, Local Strategies: Tips & Traps in Planning for Clients with International Connections

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

3:25 pm – 4:00 pm

Break with Exhibitors

4:00 pm – 5:00 pm

Cash Balance Plans for the Ultra High Net Worth Client

Larry R. Blades

5:00 pm – 6:30 pm

Reception with Exhibitors



## Honors, Awards, & 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.

2025 Recipient: To be Announced

### NAEPC Estate Planning Hall of Fame®

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

2025 Inductees: Brian H. Ashe, CLU®, LACP  
 Susan T. Bart, JD  
 Barry D. Flagg, CFP®, CLU®, ChFC®  
 Sandra D. Glazier, JD  
 James Elliott Hughes, Jr., JD  
 Justin T. Miller, JD, LL.M. (taxation), CFP®  
 Edwin P. Morrow III, JD, LL.M. (taxation), CFP®  
 John A. Warnick, 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.

2025 Recipient: Joseph V. Falanga, CPA, AEP®, TEP

7:00 am – 8:00 am

Breakfast with Exhibitors

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 – 9:55 am

Planning for an Aging Family Member

Sandra D. Glazier, JD, AEP® (Distinguished) Nominee, Jordon N. Rosen, CPA, MST, AEP® (Distinguished), and Gregg Fortune, CFP®, CFS®, AEP®, ChFC®, BFA

9:55 am – 10:35 am

Break with Exhibitors

10:35 am – 11:35 am

The Inside Scoop on the P&C Insurance Market  
Michelle Hirsch, CAPI

11:35 am – 12:35 pm

Estate Planning 2.0: Meeting the Needs of Clients with Disabilities  
Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP® (Distinguished)  
& Amy C. O'Hara, JD, CELA

12:35 pm – 1:35 pm

Lunch with Exhibitors

1:35 pm – 2:35 pm

Mental Health and Professional Advisers: It's Not Only About Clients!  
Amanda Koplin, LPC

2:35 pm – 3:35 pm

Recent Court Decisions Impacting Estate Planning  
Thomas A. Tietz, JD

3:35 pm – 4:05 pm

Break with Exhibitors / Exhibit Hall Closes

4:05 pm – 5:05 pm

Using Cash Value Life Insurance with SLATs  
Russell DeLibero, PhD, CFP®, ChFC®, CLU® and Brian Raftery, JD, CPA

5:05 pm – 6:00 pm

AEP® and EPLS Certificants Reception & Book Signing (invitation only)  
James Kirchick



6:30 pm

President's Reception (invitation only)

REGISTER  
HERE



7:00 am - 8:00 am

Breakfast, including Accredited Estate Planner® Designation from A - Z section

8:00 am - 8:05 am

Daily Remarks

8:05 am - 9:35 am

Top 40 Tax Planning Opportunities for 2025 and Beyond

Robert S. Keebler, CPA/PFS, MST, AEP® (Distinguished), CGMA®

9:35 am - 9:50 am

Break

9:50 am - 10:20 am

NAEPC Estate Planning Hall of Fame® Induction Ceremony

10:20 am - 11:20 am

Using Charitable Remainder Trusts to Defer Reporting Gain from the Immediate Sale of Marketable Securities for Cash

Jerome M. Hesch, MBA, JD, AEP® (Distinguished)

11:20 am - 12:20 pm

Artificial Intelligence – Benefits and Ethical Issues

Nancy Rapoport, JD

12:25 pm - 12:30 pm

Closing Remarks

12:30 pm - 1:30 pm

Annual Conference Closing Luncheon for Non-AEP® Designees

Concurrent Private Luncheon for AEP® Designees and EPLS Certificants

Be A PRO

Jedidiah Collins, CFP®



Conference & Council Leadership Conference Speakers, Topics, Sessions and Timing Subject to Change



## WEDNESDAY, OCTOBER 22, 2025

All Times Eastern Time

8:00 am – 12:30 pm

Council Staff Executive / Administrator Breakfast &amp; Session



12:30 pm – 1:30 pm

Lunch for All Council Leadership Conference Attendees

Concurrent Private Luncheon for AEP® Designees and EPLS Certificants



2:00 pm – 3:45 pm

Learning Pods #1, #2 &amp; Conversation Break

3:45 pm – 5:00 pm

Council by Size Session #1 (membership topics)

5:00 pm – 7:00 pm

Annual Estate Planning Council Awards Reception

6:30 pm

Council Staff Executive / Administrator Private Dinner



7:30 pm

Dine Around: Connect During Small Group Dinners (advance sign up required)



## 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 23, 2025

All Times Eastern Time

7:00 am – 8:00 am

Breakfast

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 &amp; Conversation Break

10:45 am – 12:00 pm

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

12:00 pm

Council Leadership Conference Ends



## Meetings &amp; Events

- Crafting Events with Broad Appeal
- Hot Speakers & Topics
- In-Person vs. Virtual ... What's Best Today?
- Planning a Consumer Event - NEW!
- Running an Efficient Board or Membership Meeting - NEW!

## Marketing

- Drafting Your Council's Value Proposition
- Effective Writing & Drafting Compelling Meeting Announcements

## Operations

- Advice and Guidance for Struggling Councils
- Creating a Sponsorship Program / Increasing Non-Dues Revenue
- How to Implement an AEP® Designation Council Nomination Program
- Nurturing a Warm & Welcoming Membership Environment
- Operations Checklist
- Scholarships - NEW!

## Human Capital

- Creating a Fair and Balanced Board Nomination / Selection Process
- Help! Our Board, it's BORED!
- Inspiring Volunteerism
- Starting, Populating, and Leveraging Committees - NEW!

## Membership

- Best Practices in Welcoming New Members
- Converting Guests to Members
- Creating a Member Milestone Recognition Program & Service / Achievement Awards

## Technology

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

**LEARNING  
POD  
TOPICS**



## REGISTRATION

	Before 08/09/25	08/09/25 - 09/19/25	After 09/19/25
<b>Advanced Estate Planning Strategies Conference with Council Leadership Conference Pass</b>	\$1,445	\$1,495	\$1,545
<b>Advanced Estate Planning Strategies Conference</b>			
Member	\$1,345	\$1,395	\$1,445
Non-Member	\$1,575	\$1,625	\$1,675
<b>Monday or Tuesday Educational Day Pass</b>			
Member	\$545	\$595	\$645
Non-Member	\$620	\$670	\$720
<b>Wednesday Educational Half-Day Pass</b>			
Member	\$445	\$495	\$545
Non-Member	\$495	\$545	\$595
<b>Council Leadership Conference Pass</b>	\$285	\$335	\$385

## DISCOUNTS

50%  
New AEP® Designee  
(since October 2023)

\$175  
AEP® Designee or  
EPLS Certificant

\$50  
Member of Any  
MD / VA / DC Council

\$100  
NAEPC Volunteer  
(currently serving on  
a committee)

**[REGISTER ONLINE AT NAEPCconference.org/register](https://naepcconference.org/register)**

**Cancellation / Transfer:** A request for a cancellation / transfer must be received via email to [conference@naepc.org](mailto:conference@naepc.org). A full refund for a cancellation will be granted if notice is received on or before 09/19/25. Those who cancel between 09/20/25 and 10/03/25 will forfeit a \$200 administrative fee. No refunds will be granted after 10/03/25 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 10/20/25 and going through 10/22/25 at 12:20 pm as follows.

Full Conference Attendance - Up to 14 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).

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## HOST RESORT & LODGING

The Gaylord National Resort invites you to experience a perpetual oasis with a consistent 72-degree climate inside a magnificent 19-story indoor garden atrium. Whether you're seeking relaxation at the luxurious Relâche Spa, indulging in family-friendly activities within this extraordinary resort, or venturing to explore the wonders of National Harbor, every moment promises adventure and unforgettable memories for families or those traveling alone.

The NAEPC room rate is \$279/night (before taxes and fees) plus a \$22/night resort fee that provides several amenities. Additional room types are available at discounted rates. Reservations must be made on or before September 19, 2025, by using the online reservation link: <https://book.passkey.com/gt/219701789?gtid=f5adf505ca7b00d8e48c272566446100>.

Please email [conference@naepc.org](mailto:conference@naepc.org) 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. **Unregistered companions will not be admitted to meal functions.**

## EXPERIENCE THE GAYLORD AND BEYOND

Embark on an unparalleled getaway at Gaylord National Resort in National Harbor, a mere stone's throw from Washington, DC. Nestled on the banks of the Potomac River, home to the nation's capital and a diverse array of enriching and historical neighborhoods with local monuments, unique attractions, and regional cuisine. Learn more about the area [HERE](#).

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## 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](#)

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Robert J. Ruelle, CLU®, ChFC®,  
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\* Past Conference Chairperson  
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October 19 - 23, 2025 · Washington, DC  
Gaylord National

## 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 62 years of **EXCELLENCE IN ESTATE PLANNING**
- 10) **WASHINGTON, DC!**

**LEARN MORE & REGISTER**  
[naepconference.org/register](https://naepconference.org/register)



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