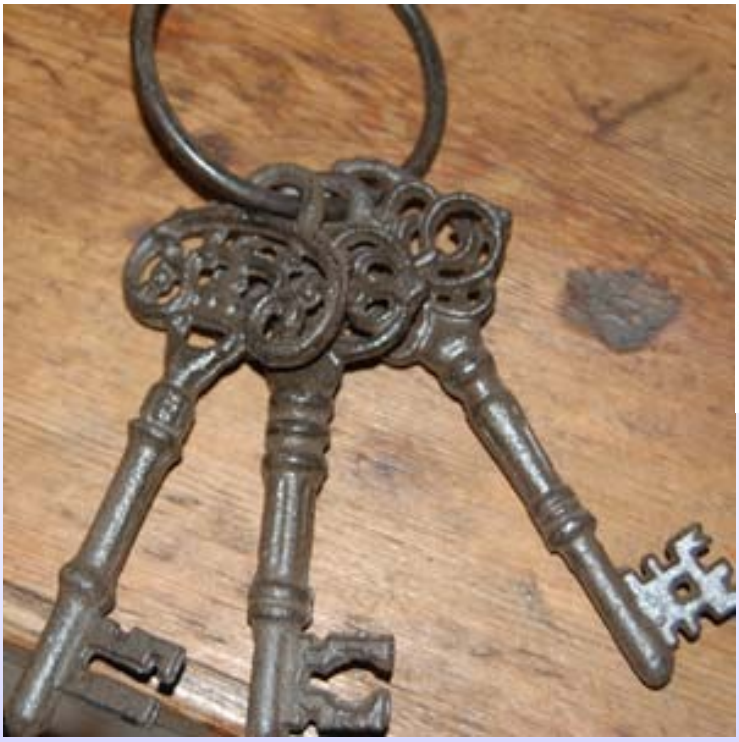


MARKETING

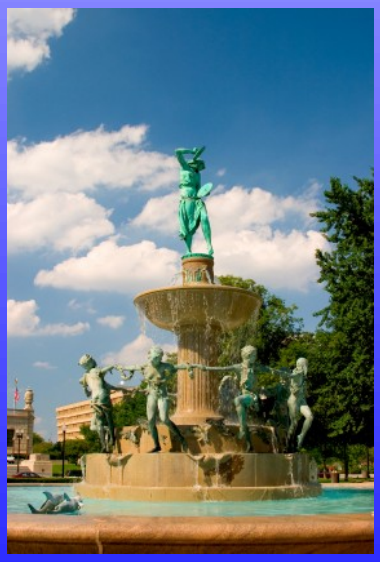
SETTLEMENT

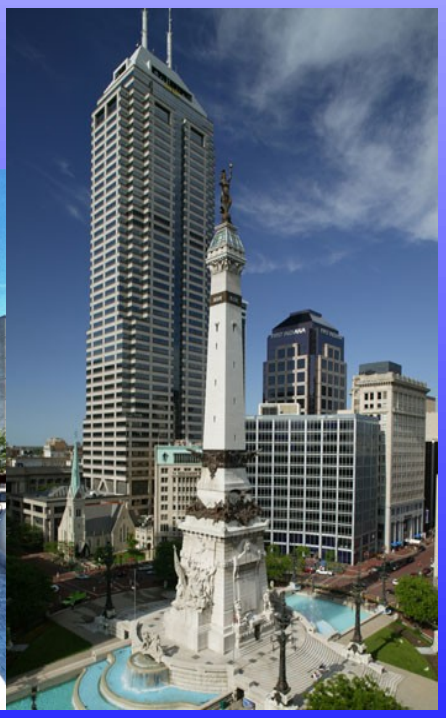
LEGACY PLANNNING

Unlocking Your Potential

The National Network of Estate Planning Attorneys
43rd Semi-Annual Estate Planning Collegium

Indianapolis
April 27 – May 1, 2009





PRE-CURSOR Monday & Tuesday, APRIL 27-28

THE SUNBRIDGE LEGACY BUILDER RETREAT

Instructor: Scott Farnsworth
8:00 a.m.—6:30 p.m. on Monday, 8:00 a.m.—5:00 p.m. on Tuesday

The SunBridge Legacy Builder Retreat is for caring advisors who value the assets of the heart as well as those that appear on a balance sheet. They understand that true wealth includes money and property, but it also encompasses so much more. During this workshop, we train caring advisors to develop the practical skills they need to help clients share the wealth of a lifetime. These two full days of hands-on immersion in the real-life tools and techniques of legacy building will forever change the way you work.

Following the retreat:

- You will walk away with a new vision of how you can make a difference in your work, in your family, and in your community. You will take home with you the skills to help clients and community members build, protect, and share their legacy.
- You will leave equipped with an entire tool box of practical, ready-to-use legacy building tools.
- You will be prepared to market yourself to your community as an authentic legacy builder, someone who cannot only talk the talk but who can also walk the walk.
- You will be qualified to become the advisor of choice and distinction in your community.
- You will be prepared to achieve greater financial success in your business.

SCOTT FARNSWORTH is an attorney and a Certified Financial Planner®. He is the president of SunBridge, Inc. and the founder of The Legacy Builder Network. He is the author of three books: *Like a Library Burning: Sharing and Saving a Lifetime of Stories, Double Your Sales: An Honest and Authentic Approach to Professional Selling,* and *Closing the Gap: A Revolutionary Approach to Client Services.* Scott was recently named one of *Financial Advisor Magazine's* "Innovators of the Year." He designs and delivers transformative workshops for professionals, including *"The Legacy Builder Retreat," "Mastering the High End Close," "The Double Your Sales Professional Workshop"* and *"The Wealth & Wisdom Summit."* He is the inventor of The SunBridge Money & Success Client Connection System™, and is a certified Time to Think® Facilitator, Coach and Consultant.

PLENARY DAY THURSDAY, APRIL 30th

8:15 am- 8:30 am

Welcome & Introductions, *Scott Williams*

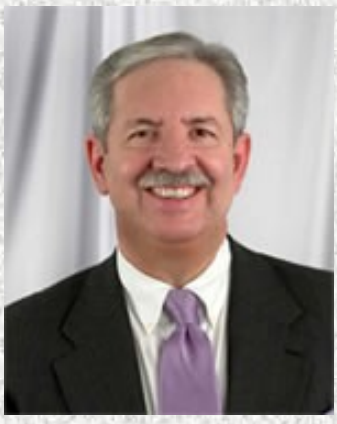
8:30 am - 9:00 am

Chairman's Corner, *Rick Randall*

Rick, NNEPA Chairman and CEO, will discuss exciting new programs and initiatives being rolled out in 2009 and 2010.

9:00 am - 10:40 am

The Purposeful Trust, *John Warnick*

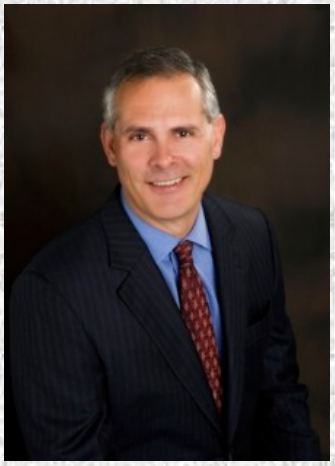


John Warnick is a Fellow of ACTEC, a member of AFHE (Attorneys for Family Held Enterprises), and Advisors in Philanthropy. John's practice emphasizes multi-generational trust planning and wealth transfer planning. He has also assisted numerous families in planning which has the flexibility to adapt to changing legal and tax climates. John balances his enthusiasm for tax savings with insightful questions which ensure the planning is congruent with the client's core values. He spends approximately twenty percent of his professional life facilitating family retreats and providing wealth counseling and fiduciary consulting services. He particularly enjoys what he describes as "Beneficiary Preparation": educating, training and mentoring adolescents and emerging adults in financial literacy, philanthropic service, and holistic family wealth principles.

He has pioneered new trust distribution and governance models which will assist trust makers and trustees in their quest to assure that wealth contributes to positive growth in the lives of heirs and beneficiaries. He has been asked to share his concepts and ideas on how trustees can better serve beneficiaries with a number of family offices, private trust companies and professional trustees.

11:00 am - 12:00 pm

What Estate Planning Attorneys Need to Know About Life Insurance, *Scott Hamilton*



Scott Hamilton is a member of the National Network of Estate Planning Attorneys, and the CEO of InKnowVision, LLC. InKnowVision is a design and tax strategies company dedicated to providing tax planning and consulting to the clients of attorneys, CPA firms and financial professionals throughout the country. Scott had a traditional law practice for over 20 years with an emphasis in the areas of estate and income taxation. As part of InKnowVision Design, he now collaborates with other professionals on clients who have an average net worth of over $20M.

As estate planning attorneys, we often find it daunting to stay current with the great variety of life insurance products that are recommended by our planning partners. Scott brings his expertise and experience in the use of large life insurance policies for estate planning purposes, to teach the fundamentals of insurance with which every estate planning attorney should be familiar. This session will enable you to carry on informed conversations with the insurance professionals with whom you work, and better protect the client's best interests.

12:00 pm - 1:45 pm

Lunch On Your Own *(if you'd like to learn more about the new Advanced Planning Strategies program, grab a sandwich and come back at 12:30 for an informal discussion)*

PLENARY DAY (continued)

2:00 pm - 3:30 pm

Prepare to Meet Thy Boom™ *Amy Florian*

Amy Florian is a widely recognized teacher and consultant specializing in the areas of grief, loss, and transition. Amy is currently an adjunct professor at the IPS, a graduate-only department of Loyola University in Chicago. Amy served as the executive director of Stauros USA, a non-profit organization dedicated to helping those who suffer and their care-givers. She has published two books and dozens of articles.

Her company, Corgenius, specializes in teaching professionals how to support and interact with people who have experienced a life-changing loss. Amy's goal is to show professionals how to establish empathetic rapport with their clients during life's painful times; a skill that is crucial to creating the trust and long-term loyalty upon which good business is based.

3:45 pm - 5:15 pm

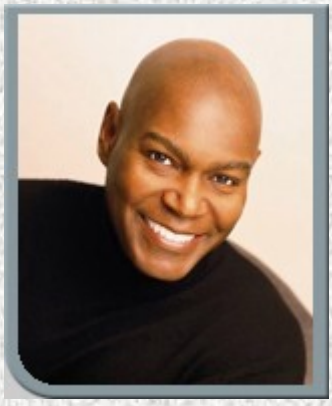
Listening Hour

NNEPA Member Advisory Board, Management, and Members

Using "Time to Think" techniques, we'll seek member input and discussion on a variety of topics relating to the future growth and continual improvement of the Network. We'll also be recognizing our most recent graduates of the Practicum Transformation Program™.

6:30 pm

Networking Dinner with Special Guest
GREG WINSTON



Relax and enjoy the evening! The Networking Dinner is a fun way to meet as many of your colleagues as possible, to develop new relationships, and catch up with old friends. PLUS, as a special treat, it is our pleasure to present guest speaker, Greg Winston.

Greg Winston is a pioneer in the study of high-performance. Companies at all levels use his seminars and training programs with proven tools for increased personal and professional success. In his early years Greg began a sales career with the Xerox Corporation and became one of their lead sales professionals. At one point in his year-to-date sales figures were 10 times more than the average sales representatives. While most sales representatives averaged 105% of budget, Winston set a **branch record of 1003%**. Immediately following that success he was then promoted to work with new hires. He used those same concepts during stints with CBS Television and Radio then Warner Bros.

GREG'S TOPIC: **SUCCESS ON PURPOSE!**

BREAKOUT SESSIONS FRIDAY, MAY 1st

Five complete tracks of breakout sessions on Friday are offered to help you build your practice. We have something for everyone - at every level! Electronic outlines and digital recordings for every breakout and plenary session are included in your registration fee. You will have access to these files after the event through the members website.

	LEGAL TECHNICAL	FUNDING & SETTLEMENT	THREE STEP STRATEGY™	MISC. TOPICS	DRAFTING
8:30 am - 10:00 am	**TRUST CREDITOR PROTECTION & HOW TO TEACH IT TO CLIENTS & ADVISORS** *Bill Coyne*	**SUB-TRUST RESTATEMENTS FOR BENEFICIARIES** *Roger McClure* *David Kerr*	**THREE STEP STRATEGY™ ROUNDTABLE** *Rick Randall, Moderator*	**MEDICAID PLANNING & MEDICAID COMPLIANT ANNUITIES** *Dale Krause*	**PLANNING PRO™ BASIC SKILLS** *Mike Jones*
10:30 am - 12:00 pm	**The TRUST PROTECTION SPECTRUM™ & The TRUST PROTECTIONS EXTENDER™** *Rick Randall,* *Jim Collins*	**REAL ESTATE FUNDING ISSUES** *Howard Stross*	**STEWARDSHIP & CHARITABLE GIVING CONVERSATIONS w/ CLIENTS & FINANCIAL ADVISORS** *Dave Frisse*	**MEDICAID ROUNDTABLE** *David Kerr,* *Kevin Cotter,* *Dale Krause*	**PLANNING PRO™ CUSTOMIZATION** (Prerequisite: PlanningPro™ Basics – see above) *Mike Jones*
1:30 pm - 3:00 pm	**A NEW ASSET PROTECTION STRATEGY FOR HIGH NET WORTH CLIENTS** *Teresa Morgan* *Randall Borkus*	**706 ESTATE TAX RETURN PREPARATION** *Ed Lowry* *David Kerr*	**HOW TO PROVIDE EVEN GREATER VALUE and EARN BETTER FEES FOR YOUR STEP 2 SERVICES** *Scott Farnsworth* *Rick Randall*	**ESTATE PLANNING MARKETING ROUNDTABLE** *Andrew Sigerson, Moderator*	**DRAFTING DAY CAMP (PART 1)** *Jim Collins,* *Mike Jones*
3:30 pm - 5:00 pm	**NAMING A CHARITABLE REMAINDER TRUST AS THE BENEFICIARY OF AN IRA** *Peter Gilbert* *Randall Borkus*	**BENEFICIARY DESIGNATIONS IN SUMMARY PLAN DESCRIPTIONS, CUSTODIAL AGREEMENTS, & ANNUITIES** *Justin Dituri*	**SETTLEMENT COUNSELLING ISSUES** *David Kerr* *Ed Lowry* *Curt Ferguson* *Rick Randall*	**REPRESENTING LOTTERY WINNERS** *Bo Loeffler*	**DRAFTING DAY CAMP (PART 2)** *Jim Collins,* *Mike Jones*

HOTEL & TRAVEL INFORMATION

EVENT HOTEL

Omni Severin Hotel
40 West Jackson Place
Indianapolis, IN 46225

The four-diamond Omni Severin Hotel is located in the heart of downtown Indianapolis, connected to Nordstrom, Circle Centre Mall and the Convention Center.

Reservation Method: Call **1-800-843-6664** (mention "National Network of Estate Planning Attorneys" for the **group rate of $109**) or click here.

Cut-off Date: April 6, 2009. Reservations made after the cut-off date will be available at the hotel's prevailing room rates ($269 - $399).

TRANSPORTATION

(distance, fees, and rates are based on Omni's location—travel time to and from the airport is dependent upon time of day and traffic volume)

Indianapolis International Airport (IND)

Distance: 8 mi.
Taxi Fare: $20 - 25 one-way

REGISTRATION

Register Online Today!

To register for one or more of the workshops that are offered at the Spring Collegium, you must complete the online registration process. Go to www.nnepa.com to access the online registration form for this event. Then simply follow the instructions to register for the workshop(s) you'd like to attend.

Questions? Call 1-866-361-1617 • E-Mail: registration@nnepa.com