

Proposed Program Agenda

9:00 AM – 9:30 AM

Welcome and Opening Remarks
Leslie Daane

Introduction to the Estate Planning Council purpose, programs, and advantages of membership.

Richard Wait, Member
NAEPC Council Relations Committee

9:30 AM – 11:30 AM

Wealth Transfer Tax Developments – It's 2009; What Will Congress Do?
Jonathan Blattmachr

11:30 AM – 1:00 PM

Lunch with the Sponsors and Exhibitors in the Exhibitor space to allow for more exposure to the exhibits and to allow the companies to lunch with attendees.

1:00 PM – 2:30 PM

Business Succession Planning
Dennis Roberts: How Business Exit Strategies Affect Estate Planning.

2:30 PM – 3:00 PM

Break

3:00 PM – 4:30 PM

Robert Burton: Estate Planning with Life Insurance.

4:30 PM – 5:00 PM

Closing remarks and invitation to join EPCNN.
Leslie Daane

Raising the Estate-Planning Bar
Mastering the Team Approach to Estate Planning

Conference Registration

Print Name: _____

Firm Name: _____

Profession: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Fax: _____

Email: _____

Registration Fee:

<input type="checkbox"/> \$195.00	\$195.00
<input type="checkbox"/> Less \$25 registration postmarked prior to April 1, 2009	-\$
<input type="checkbox"/> Less \$25 if a member of Estate Planning Council of Northern NV	-\$
<input type="checkbox"/> Less \$25 member of other Estate Planning Council: (name of council) _____	-\$
Total	\$

Check enclosed in the amount of \$ _____

Charge my VISA MasterCard Discover Card # _____
Expiration date: _____

Signature: _____

Multiple registrations from a single firm can be paid with one check or credit card, but each registrant must provide a separate registration form.

SPONSOR & AND EXHIBITOR PACKAGE

RAISING THE ESTATE-PLANNING BAR –

Mastering the Team Approach to Estate Planning

A Conference presented by: Estate Planning Council of Northern Nevada

May 15, 2009

Reno, Nevada

Peppermill Resort Casino
and Hotel



Welcoming Estate Planning professionals from all disciplines as well as the professions that provide support and resources: Attorneys, CPAs, Trust Officers, Insurance, Financial Planners, Banks, Trust Companies, Art and Antique Dealers and Appraisers, etc.

ESTATE PLANNING COUNCIL

OF NORTHERN NEVADA

500 Damonte Ranch Parkway, Ste. 860

Reno, Nevada 89521

Telephone 775.823.9455 Facsimile 775.823.9456

Bradley B Anderson

Estate Planning Conference Committee

Chairman

March 18, 2009

AN UNPRECEDENTED OPPORTUNITY!

We want you to be among the first to be given the opportunity to have your business exposed in a positive and prominent way to hundreds of estate planning professionals in Northern Nevada and California by sponsoring the conference entitled **Raising the Estate-Planning Bar – Mastering the Team Approach to Estate Planning** presented by the Estate Planning Council of Northern Nevada

Who will attend the Conference?

This conference is the first of its kind in Northern Nevada and will attract literally hundreds of attorneys, CPAs, insurance professionals, financial planners, trust officers and officers of charities, and businesses related to estate planning.

How can we get our company in front of hundreds of potential customers and decision makers?

The Estate Planning Council of Northern Nevada is hosting a conference that will have nationally recognized speakers from all around the country. To have such speakers in Reno will bring professionals from every discipline and every corner of this area of the country. Enclosed is a packet to explain how to sponsor a session of the conference, various levels of sponsorship or simply provide an exhibit in the exhibit hall of the meeting area. As a sponsor you may be able to contact conference participants directly even before the conference with a welcome and invitation to go to your booth. You will be able to put a gift in the “goodie bag” and have your company’s name prominently displayed in the front of the hall by the speaker’s platform.

What do I have to do to take advantage of this opportunity?

Review the information in the Sponsor Packet and decide at which level you would like to participate and return the commitment form with the initial payment. You will be contacted by EPCNN to determine the take away goodies and inclusion of your ad in the literature to be included in the “goodie bag” and participant binders.

Be sure not to miss the deadlines and miss out on an unprecedented opportunity!



ESTATE PLANNING COUNCIL OF NORTHERN NEVADA

ESTATE PLANNING COUNCIL OF NORTHERN NEVADA

The Estate Planning Council of Northern Nevada (EPCNN) is one of the oldest councils affiliated with the National Association of Estate Planners and Councils (NAEPC). It is a medium-sized council that is poised to grow substantially in the coming years. It is an organization focused on establishing and maintaining the highest professional standards among its members.

EPCNN fosters a collaborative association among the major professions and callings that deal with estate planning and the entities that cater to, or are associated with those professions. Thus, our executive board has officers who are attorneys, CPAs, trust officers, CLUs, and CFPs and our membership includes representatives from charitable organizations, long-term care facilities, art and antique appraisers, to name a few.

EPCNN is a proud affiliate of NAEPC which fosters these principles nationwide.

GENERAL CONFERENCE & LOCATION INFORMATION

The day-long conference is devoted entirely to educational programs with nationally recognized speakers from around the country. This is an unprecedented conference which will attract attendees from every discipline associated with estate planning. It is being promoted in every professional journal and periodical of every associated profession, as well as mail and email, where possible. Each participant is a professional who devotes a major portion of his or her practice and business to estate planning. The conference will draw attorneys, financial planners, insurance professionals, trust officers, accountants and planned giving professionals from all over northern Nevada and eastern California.

The **Peppermill Resort Casino Hotel** in Reno is the most award-winning hotel casino in Reno offering ten distinctive restaurants, seventeen bars and lounges with Reno's most exciting night life, world-class gaming from slots to table games, and a full-service salon for your relaxation and enjoyment.

Be sure to schedule extra time to enjoy scenic northern Nevada from beautiful Lake Tahoe with its majestic mountains and crystal-clear water to the unusual Pyramid Lake set in the desert with its mineral formations and water sports. There are miles of mountain hiking and biking trails and, who knows, with our unpredictable weather, skiing may still be an option.



ESTATE PLANNING COUNCIL OF NORTHERN NEVADA

GENERAL SPONSOR/EXHIBITOR INFORMATION

Sponsorship & Exhibitor arrangements cannot be confirmed until the EPCNN receives an executed Commitment Form which is a part of this package. By completing, signing and returning an executed Commitment Form, the sponsor/Exhibitor agrees to abide by the rules and regulations of this event, which are also attached.

Exhibitor set-up will take place in the morning of Friday, May 15, 2009 and teardown will take place after the final break Friday afternoon, May 15, 2009. Exhibitors will be open and available to participants during all meal and break periods for the duration of the conference. Attendees from Sponsoring/Exhibiting companies are encouraged to register for and attend all conference related events.



ESTATE PLANNING COUNCIL OF NORTHERN NEVADA

GOLD

Commitment Level	\$1,500 (unlimited per industry)
Payment Terms	Full payment due with Commitment Form not later than February 1, 2009

Benefits

Special Benefits

- Co-sponsor of a speaker of national prominence, with another Gold-level sponsor.
- Logo on all pre-conference communications
- Logo on conference program distributed to conference participants.

Conference Participation

- Tabletop Exhibition space, if you choose to do so (see “Basic Exhibitor Information” on EXHIBITOR page).
- 2 full conference registrations. Registration sharing is not permitted.

On-site Conference Public Relations

- Half-page ad in conference folder.
- Recognition from podium during introduction of speaker.
- Opportunity to display banner provided by you onsite during conference.
- Opportunity to insert take-away item into conference “goodie bag.”



ESTATE PLANNING COUNCIL OF NORTHERN NEVADA

Exhibitor

Commitment Level	\$500 Space is limited and available first come, first served with priority given to Sponsors.
Payment Terms	Full payment due with Commitment Form. No deadline, but if you want to be listed on communications, must be in by Feb. 1, 2009

Benefits

Conference Participation

- 1 full conference registration, additional registrants from exhibiting company is half-price. Registration sharing is not permitted.
- Meals and breaks will be in the exhibit area where representatives may mingle with conference participants.

Special Benefits

- Name printed on all pre-conference communications

On-site Conference Public Relations

- Quarter-page ad in conference binder.
- Take-away items are allowed at display table.

Basic Exhibitor Information

Show times:

- Show times are before and after the conference, breaks and lunch time. Display tables should be manned during those times.

On-site Accommodations:

- One 6 foot skirted table
- One chair per table
- Fully carpeted display area

Display Guidelines:

- Due to space limitations, only tabletop displays will be permitted with the exception of Diamond Sponsors.