2020 Robert G. Alexander Webinar Series

National Association of Estate Planners & Councils

2020 Programs - Wednesday webinars

January 8, 3:00pm - 4:00pm ET
The NEW Reverse Mortgage - 5 Ways Housing Wealth is Changing the Estate Planning Conversation
Don Graves, RICP®, CLTC®, CSA

January 29, 3:00pm - 4:00pm ET
Complimentary Sponsored Webinar
Life Settlement Legal and Ethical Responsibility
Jon B. Mendelsohn, CEO and Co-Founder of Ashar Group/Ashar SMV

February 12, 3:00pm - 4:00pm ET
Basis Step-Up Strategies in Light of Portability and Tax Law Changes
Steven B. Gorin, JD, CPA, AEP®

March 11, 3:00pm - 4:00pm ET
Charitable Giving and Tax Planning Strategies in the TCJA Era
Patrick J. Saccogna, JD, LL.M. (taxation), CPA*, AEP®
[* = inactive CPA status]

April 8, 3:00pm - 4:00pm ET
The Ethical Considerations of NYS DFS Reg 187, FINRA Rule IM2210 and the UPIA Relating to "Decision Support Material" Used in the Life Insurance Decision Process: A Program for All Fiduciary Professionals
Steven S. Zeiger, CEBS, TEP

May 13, 3:00pm - 4:00pm ET
Collaboration Matters: Working Together to Produce Extraordinary Results
Albert E. Gibbons, CLU®, ChFC®, AEP® (Distinguished)

May 20, 3:00pm - 4:00pm ET
Remote Signing, Witnessing, and Notarization of Estate Planning Documents: Is the Future Here?
Timothy S. Reiniger, Esq.

June 10, 3:00pm - 4:00pm ET
Planning Team Revenue Opportunities Generated by New Tax Law
Terri L. Getman, JD, CLU®, ChFC®, RICP®, AEP® (Distinguished)

2020 Robert G. Alexander Webinar Series (continued)

National Association of Estate Planners & Councils

July 8, 3:00pm - 4:00pm ET
What Estate Planning Professionals Need to Know About Cybersecurity in the Era of COVID-19
Justin Joy, JD, CIPP/US, CIPT

August 12, 3:00pm - 4:00pm ET
Creative Ways to Fund Business Owner Retirement
Vincent D'Addona, CLU®, ChFC®, RICP®, RFC, CExP™, MSFS, AEP® (Distinguished)

September 9, 3:00pm - 4:00pm ET
Zen and the Art of Trust Modification
Susan T. Bart, JD

October 1, 3:00pm - 4:00pm ET
A Complimentary program provided with Trusts & Estates and sponsored by the AEP® designation*: Multiplying Assets in a Pandemic Era: Family Cohesion, Family Values and Family Wealth*
Susan J. Travis, CFP®, CTFA, AEP®, Tom Rogerson, Amanda Koplin, LPC

October 14, 3:00pm - 4:00pm ET
International Planning
Joseph A. Field, JD

December 9, 3:00pm - 4:00pm ET
Virtual Shift: How to Work Online with Meetings, Webinars and More
Dean DeLisle, Founder and CEO, Forward Progress

Registration Fees: Single Program

$40 Accredited Estate Planner® designee
$60 Member of an affiliated local estate planning council or at-large member of NAEPC
$100 Non-member
$250 Council meeting / group gathering (one feed to be shown in a single location to a group, additional feeds can be purchased for $25, contact webinars@naepc.org for more information)

Yearly Subscription: *The yearly subscription offers a substantial discount to attend all of the programs during the calendar year! After completing the registration, you will be emailed a discount code that can be used to register for the programs you wish to attend. (Please allow up to a week for processing.)*

$280 Accredited Estate Planner® designee - *$360 value*
$420 Member of an affiliated local estate planning council *or at-large member of NAEPC - $540 value*
$700 Non-member - $900 value
$1125 Council meeting / group gathering (one feed to be shown in a single location to a group, additional feeds can be purchased for $25, contact webinars@naepc.org for more information) - *$2250 value*

Continuing education credit is available at each webinar for Accredited Estate Planner® designees.