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 **must** submit their request form to NAEPC rather than contacting speakers directly.

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

ALL REQUESTS ARE BASED ON SPEAKER AVAILABILITY.

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

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Speakers:

Monique Lavender Greenberg, JD, LL.M, AEP®
Coral Gables, Florida
current board of directors

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

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

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

Katherine (Katie) M. Sheehan, JD, AEP®, ATFA
Boston, Massachusetts
current board of directors

Rachel L. Votto, CPA, AEP®
Ridgewood, New Jersey
current executive committee

For nearly 20 years, NAEPC has been offering website solutions to its affiliated councils that are easy to use, economical, and continuously enhanced.

VALUE: delivering a cost-effective option for both website and administrative needs.

SIMPLICITY: giving even the most tentative user the confidence to know that he or she is working efficiently for their association

FOCUS: streamlined administration means that volunteer leadership can concentrate on growth and direction, while clearly sharing the association's message, mission, and network with its core audience

Monique Lavender Greenberg, JD, LL.M, AEP®
Coral Gables, Florida
current board of directors

Availability:

Programs up to 2 hours, dependent on Ms. Greenberg's schedule and the amount of notice

Virtual or In-Person Programs

Topics:

- **Major Repercussions, Minor Children: Estate Planning for Families with Minor Children**
- **Artful Estates: Estate Planning for Art Collectors**
- **Celebrity Estate Planning Gone Wrong**

Monique Lavender Greenberg is a Florida Board Certified Wills, Trusts, and Estates Attorney and a Florida Civil Circuit Court Mediator. She is the Managing Attorney at Lavender Greenberg PLLC in Coral Gables, FL. In this role, she focuses her practice on estate planning and probate law, advising families and individuals on the financial, legal, and tax aspects of their estate plans. Monique has both a J.D. and an LL.M. in Estate Planning from the University of Miami, and she has also been awarded the Accredited Estate Planner (AEP) Designation from the National Association of Estate Planners & Councils.

Monique currently serves on the Board of Directors for the National Association of Estate Planners & Councils. She has been a member of the Greater Miami Estate Planning Council for several years and is a Past President of the Coral Gables Estate Planning Council. She also serves on the Board of Directors for the Coral Gables Bar Association and Beaux Arts Miami, and she is a past board member of the Junior League of Miami. Additionally, she is a member of the Miami-Dade County Bar Association, UM Planned Giving Advisory Board, Florida Association of Women Lawyers, Florida Lawyers Network, and the Coral Gables Bar Association. Through her active involvement in legal organizations, Monique continues to shape and elevate the standards of estate planning and legal excellence.

Recent or Upcoming Speeches through the No-charge Speaker Program

EPC of Montgomery County, (MD)

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

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

Availability:

Programs up to 2 hours
Virtual or In-Person Programs

Topics:

- **Designing the Ultimate Modern Dynasty Trust**
- **Powerful Trust Laws to Protect Family Wealth and Combat Future Uncertainties: Taxes, Economy, Family, Divorce, Asset Protection**
- **Why are Private Family Trust Companies so Popular?**
- **Directed Trusts, Private Family Trust Companies, and Other Powerful Alternatives**
- **Interesting Trends With Millennials & Trusts**
- **Does Estate Tax Repeal Really Matter?**
- **Is a Wealth Tax in Our Future?**
- **The Next Tsunami - Charitable Giving with Non-Charitable Trusts**
- **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 $165 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-Chairman of the editorial board of Trusts and Estates magazine and has been a member for more than 33 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®
Los Angeles, California
current executive committee

Availability:

Programs up to 2 hours
Virtual or In-Person Programs

Topics:

- **Behavioral Finance: Is it rational or irrational**
- **Myths about Social Security: Understanding Benefits**
- **Protecting Yourself from Identity Theft**
- **Estate Planning for different cultures: What are the barriers**
- **The Myths of 529s: Transfer Millions out of an Estate?;**
- **Socially Responsible Investing: Do my Investments Match my Values?**
- **Intelligent Withdrawals: Tax efficiency and Maximizing the Income you Keep**
- **Maximizing the Benefits of Charitable Giving Through Assets vs. Income;**
- **Impact of Long Term Care and Health Expenses on Legacy Preservation**
- **Strategies to Preserve the Family Legacy: How do you talk with your family about money and values?**

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, a financial services veteran, joined Morgan Stanley as a Financial Advisor in Pasadena, CA in 2013 and is currently with the Envision Legacy Group in Beverly Hills, CA. 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. While at the community foundation 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 from coast to coast. 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 2024 President for NAEPC and as a board member of 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)

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

Availability:

Programs up to 3 hours
In-Person Programs

Topics:

- **Transition by Design – Successful Succession of the Family Business and Wealth**
- **Family Dynamics and Intergenerational Conflict: Family Governance as a Tool for Preserving Family Wealth and Harmony**
- **High Performance Teaming & Professional Collaboration**

Susan Rounds 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)
Charlotte EPC (NC)
Chester County EPC (PA)
Coeur d'Alene EPC (ID)
Colorado West EPC (CO)
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)
EPC of Mobile (AL)
EPC of Westchester County (NY)
EP & Trust Council of Long Beach (CA)
Eugene EPC (OR)
Fairbanks EPC (AK)
New Mexico EPC (NM)New Orleans EPC (LA)
Magic Valley EPC (ID)
Northcentral Pennsylvania EPC (PA)
Northwest Washington EPC (WA)
Palm Beach County EPC (FL)
Red River Valley EPC (ND)
Redwood Empire EPC (CA)
Sacramento EPC (CA)
Santa Clara County EPC (CA)
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)

Katherine (Katie) M. Sheehan, JD, AEP®, ATFA
Boston, Massachusetts
current board of directors

Availability:

Programs up to 2 hours
Virtual or In-Person Programs

Topics:

- **Put the Success in Business Succession Planning**
- **Stop Talking and Start Planning, Getting your Clients to Plan**
- **Planning for Loved Ones with Special Circumstances**
- **Choosing the Right Fiduciary**
- **Fundamentals of Transfer Tax**

Katie is a Managing Director and Wealth Strategist with Crestwood Advisors, LLC, in their Boston office. Prior to joining Crestwood, Katie was a Wealth Strategist at SVB (formerly Boston Private). Before joining Boston Private, Katie was a Partner at DesRosiers, Tierney & Sheehan, LLC, and practiced at Cody & Cody, LLC and Ruberto, Israel & Weiner. Her private practice career concentrated in the areas of estate planning, estate and trust administration, charitable planning, long term care planning and elder law. Prior to private practice Katie served as Trust Counsel for Boston Financial Management.

Katie received her undergraduate degree from Boston College (B.A., magna cum laude, 1998), and her law degree from Suffolk University Law School (J.D., magna cum laude, 2003). While in law school, Katie served as a research assistant for Professor Charles E. Rounds, Jr., aiding in the completion, of Loring A Trustee's Handbook (2002 Edition). Katie has given numerous presentations on estate and tax planning topics, has been quoted and published in national publications, is the Co-Editor and Chief of the NAEPC Journal of Estate and Tax Planning and serves regularly as a faculty member for MCLE. Katie is a member of the Boston Estate Planning Council (BEPC) where she currently serves as the Secretary, and she serves on the board for the National Association of Estate Planning Councils (NAEPC). She is licensed to practice law in Massachusetts.

Rachel L. Votto, CPA, AEP®
Ridgewood, New Jersey
current executive committee

Availability:

Programs up to 1 hour
Virtual or In-Person Programs

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)

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• How the Program Works

- One presentation per council is available (September 2025 – August 2026)
- 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, the 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.

After submitting the final page of this packet via email to councilservices@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 Sarah Pierce at the NAEPC office with any questions.

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Speaker Request Form

Council Name: ____

Contact Name: ____

Contact Position within Council (circle one):

Staff Executive Officer Board Member Other: ________________

Contact Phone: ____

Contact Email: ____

Presentation Date (2-3 options recommended): ________________________

Meeting Start and End Time & Time Zone: ___________________________

Presentation Length Estimated: ________________________________

Preferred Delivery Method (virtual, live, or no preference): _______________

Choice (indicate at least one but not all, 2-3 options recommended):

___ Monique Lavender Greenberg

___ Al W. King, III

___ Kit Mac Nee

___ Susan P. Rounds

___ Katherine (Katie) M. Sheehan

___ Rachel L. Votto

Please Return the Completed Form to Sarah Pierce:

councilservices@NAEPC.org

National Association of Estate Planners & Councils
2001 Crocker Rd, Westlake, OH 44145