ESTATE PLANNING COUNCIL OF NAPLES, INC.

DATE: October 13, 2017
TO: Members of the Estate Planning Council of Naples, Inc.
FROM: Amy Owen and Lisa Lipman, Co-Editors
RE: Article Submissions and Advertising:
33rd edition of the Estate Planning Council's Annual Supplement to the *Naples Daily News,*
Sunday, March 4, 2018

It's that time again: time to present our best ideas and practices for estate and financial planning to the readers of the *Naples Daily News.* For those of you who have participated before, we look forward to this year's contribution. For everyone else, we invite you to support this important annual tradition.

I. Article Topics:

Attached is the list of proposed article topics. If you are interested in authoring an article, you may select from this list or provide a topic of your choice. We welcome suggestions for new topics, particularly those focused on innovative and emerging estate planning tools and laws. You may not select a topic that you have written about in the prior two (2) Supplements. Remember that the audience of the Supplement is the *Naples Daily News* readers, so scholarly subjects are not appropriate for this type of publication. Please include three (3) topics, in order of preference, on the attached **"Article Selection Form"** with the other requested information. Please submit the form by email or fax as indicated at the bottom of the form. Please submit a form even if you have previously indicated an interest in authoring an article on a certain topic. Topics will be assigned on a first come, first served basis.

II. Authorship Criteria:

To author an article for publication in the Supplement, you must meet both of the following criteria: (1) You must be an active member of the Estate Planning Council; and (2) you or your firm must purchase ad space in the Supplement.

We may accept an article written by a non-member only if the article is co-authored with a member of the Council. Remember that only individuals can be members of the Council; firms or organizations do not have "group" memberships. Please note it is your responsibility to ensure that you are an active member prior to submitting your article or advertisement. If you have a question concerning your membership status, please contact Marsha Jamison at marsha@timelyconcierge.com or (239) 200-6918.

Articles cannot exceed 600 words (excluding the title and your biographic information). We strictly adhere to the word limitation. Articles that exceed this limit will be returned to the author for further revisions and considered to be unsuitable. Please do not submit "canned" articles written by a third party on behalf of you or your firm. Additionally, because of space limitations, we cannot print any tables or graphics with your article.

III. Submission and Publication of Articles:

We endeavor to publish every article submitted, and we are pleased to report that for five (5) years running, every article has been published! However, the amount of article space is directly related to the amount of advertised space purchased. **Priority for the publication of articles will go to complete and proper submissions, in the order received.** You are encouraged to submit your article early and in the proper format to increase your chances of publication.

Articles must be submitted by Friday, January 12, 2018. If you are attending the Heckerling Institute, please note that your article will be due before the Institute. **Submissions must be delivered to Amy Owen electronically by email (addressed to Manon Yost at manon.yost@hawthorn.pnc.com, copying Amy at amy.owen@hawthorn.pnc.com).**

It is not necessary to submit a biography. The Supplement incorporates a standard format, which will include (i) the author's name, (ii) the name of the author's firm or institution, (iii) the author's membership affiliation with the Council (i.e., attorney, accountant, trust officer or financial planner), and (iv) and the position the author currently hold within the Council, if applicable. Attorneys active in legal practice will be identified by the "Esquire" designation and Board Certified attorneys will be identified as such. Accountants or financial planners will be identified either as "Certified Public Accountants" or "Certified Financial Planners." Individuals who hold one or more certifications will be identified by the certification that applies to his or her membership affiliation in the Council.

If space permits, we will once again include an article index, including pictures and contact information of the authors. Please make sure to include the email address and phone number you wish to include on this page with your article submission.

IV. ADVERTISING

If you do not wish to write an article, we still invite and encourage you or your company to purchase ad space in the Supplement. As mentioned above, advertising is critical to the success of the Supplement. If you have not been contacted in this regard, please contact our advertising assistant, Patty Luppy, at 239.963.0753 or at PLuppy@finemarkbank.com. All advertisers will be billed directly. All members will pay for their Supplement ads at the Estate Planning Council's contracted rate. You will not be billed at any separate contract rate that you may have with the *Naples Daily News*. Patty will advise you of the Council's contracted rates. Patty can provide information regarding ad specifications upon your request. **Advertisements must be submitted by Friday, January 19, 2018.** Please submit ads as directed on your advertising confirmation invoice.

If you have any questions, please feel free to call or email us. Amy can be reached at 239-687-7072 or the email address listed above. Lisa can be reached at 239.213.3863 or llipman@ralaw.com.

On behalf of the Council, we offer our sincere thanks for your participation and support.

We look forward to publishing a special edition filled with outstanding articles and greatly appreciated advertisements by our sponsors!

Our best regards,

Amy & Lisa

2018 SUGGESTED TOPICS FOR ARTICLES

1 Annual Gifting
2 Asset Protection
3 Buy-Sell/Shareholder Agreements
4 Choosing Your Fiduciary (Trustee and Personal Representative)
5 Choosing Your Investment Advisor
6 Charitable Lead Trusts
7 Charitable Remainder Trusts
8 Charitable Tax Planning Ideas - An Overview
9 Closely Held Businesses
10 Dynasty Trusts
11 Elective Share and Other Spousal Entitlements
12 Establishing Florida Domicile
13 Estate Equalization
14 Estate Planning for Blended Families
15 Exit Strategies for Family Business
16 Family Limited Partnerships and Limited Liability Companies
17 Fees of a Fiduciary and its Attorney
18 Florida Power of Attorney Act
19 Florida's Principal & Income Act
20 Florida Trust Code
21 Funding Trusts
22 Generational Planning With Trusts
23 Grantor Retained Annuity Trusts
24 Guardianship
25 HIPAA (Health Care Disclosure) Issues in Estate Planning
26 Homestead and Property Tax Issues
27 Incapacity Planning
28 Income Tax Planning
29 International Estate Planning
30 Investment Diversification
31 IRAs (including Roth), Pensions and other Deferred Compensation
32 Joint Ownership - Benefits and Pitfalls
33 Life Insurance Trusts
34 Life Insurance – when is it necessary
35 Lifetime Use of the Applicable Exclusion Amount
36 Living Wills and Health Care Surrogates
37 Non-Citizen Spouses
38 Overview of Estate, Gift and GST Taxes
39 Planning for Education
40 Planning with Out-of-State Real Property
41 Portability
42 Post Mortem Planning/Disclaimer Planning
43 Probate Process – An Overview
44 Qualified Personal Residence Trusts
45 Retirement Planning
46 Revocable Trusts
47 Roth IRAs versus "Regular" IRAs
48 Sales to Intentionally Defective Grantor Trusts
49 Signs of Incapacity
50 State Death Tax Issues
51 Surviving Spouse's Responsibilities at Death of First Spouse
52 Tax Forms – An overview of different fiduciary tax forms
53 Tax Ramifications of Improper Planning
54 Tax Reform Proposals
55 When Should I Review My Estate Plan?

ESTATE PLANNING COUNCIL OF NAPLES, INC.

33rd Annual Supplement to the Naples Daily News
for publication on March 4, 2018

ARTICLE SELECTION FORM

Name: ______________________________

Firm: ______________________________

E-mail address: ______________________________

Telephone: ______________ Fax: ______________

☐ I would like to write an article on the following subject (list in order of preference):

1st Choice: ______________________________

2nd Choice: ______________________________

3rd Choice: ______________________________

☐ I would like for someone to write an article on the following subjects:

____

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ARTICLES WILL BE ASSIGNED ON A FIRST-COME, FIRST-SERVED BASIS.
ARTICLES DUE ASAP, BUT NO LATER THAN JAN. 12, 2018.

Please return this form to Amy Owen / Manon Yost by fax at 239.687.7099

or by e-mail to

amy.owen@hawthorn.pnc.com / manon.yost@hawthorn.pnc.com

Estate Planning Council of Naples, Inc.

2018 ADVERTISING SELECTION AND RATE SHEET

PUBLISH DATE: SUNDAY, MARCH 4, 2018

RE: *Naples Daily News* **2018 - Estate Planning Supplement – 33rd Edition**

Please complete form and return to:

Patty Luppy, Advertising Coordinator
PHONE: 239-963-0753
EMAIL: pluppy@finemarkbank.com
FAX: 239-963-0702

CONTACT NAME: ______________________________

FIRM/GROUP: ______________________________

EMAIL: ______________________________

PHONE: ______________________________

Your ad selection may be in black and white or color and in the following sizes:

***Please Note – The sizes and rates have NOT increased for the 2018 edition.**
This will be the *eleventh (11th)* year without a rate increase!

SIZE (Width x Depth)	BLACK & WHITE		FULL COLOR	
1.3889" wide x 5" deep	$315.24	☐	$429.24	☐
2.9444" wide x 5" deep	$630.48	☐	$858.48	☐
4.5" wide x 5" deep (1/4 page)	$945.72	☐	$1287.72	☐
6.0556" wide x 5" deep	$1260.96	☐	$1716.96	☐
9.1667" wide x 5" deep (1/2 page)	$1891.44	☐	$2575.44	☐
9.1667" wide x 10" deep (Full page)	$3782.88	☐	$5150.88	☐

TO MAKE YOUR SELECTION, CHECK THE BOX TO THE RIGHT OF YOUR CHOSEN AD SIZE AND COLOR CHOICE AND RETURN THIS FORM BY EMAIL AS SOON AS POSSIBLE TO THE ATTENTION OF "PATTY LUPPY", AT pluppy@finemarkbank.com OR FAXED TO 239-963-0702.

****After receiving your ad size commitment, we will forward an invoice to you for payment along with instructions for ad submission. If you subsequently decide to increase the size of your advertisement or colorize it, you will be billed separately for the increase.**

Advertisements must be submitted by Friday, January 19, 2018

Thank you for your support of the Estate Planning Council!