ESTATE PLANNING COUNCIL OF NAPLES, INC.

DATE:	October 22, 2021
TO:	Members of the Estate Planning Council of Naples, Inc.
FROM:	Marcie Charles and Christopher Price Co-Editors
RE:	Article Submissions and Advertising 37th Edition of the Estate Planning Council's Annual Supplement to the *Naples Daily News*, for publication on Sunday, March 6, 2022

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, thank you and 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. 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.

Due to printing and layout limitations, a maximum of three (3) persons/co-authors per article is permitted.

III. Submission and Publication of Articles

We endeavor to publish every article submitted, and we are pleased to report that for at least the past nine years, every article has been published! However, the amount of article space is directly related to the amount of advertising 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 no later than 5:00 p.m. EST, Friday, January 7, 2022. Submissions must be delivered to **Marcie Charles** electronically by email (addressed to **Jennifer Stevenson** at jstevenson@gfpac.com with a copy to Marcie at mcharles@gfpac.com).

It is not necessary to submit a biography. The Supplement incorporates a standard format biography, which will include: (1) the author's name, (2) the name of the author's firm or institution, (3) the author's membership affiliation with the Council (i.e., attorney, accountant, trust officer, financial planner, etc.), and (4) and the position the author currently holds 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 as either "Certified Public Accountants" or "Certified Financial Planners." Individuals who hold one or more certifications may 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. To purchase advertising space, 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*. The advertising specifications, rates and commitment form are included in the packet for your convenience. **Advertisements must be submitted by Friday, January 14, 2022**. Please submit ads as directed on your advertising confirmation invoice.

If you have any questions, please feel free to call or email us. Marcie can be reached at 239.514.1000 or at mcharles@gfpac.com or Chris can be reached at 239.325-5070 or at cprice@probateandplanning.com.

We are looking forward to an excellent supplement made so by your contributions.

On behalf of the Council, thank you for your participation and support.

Marcie and Chris

2022 SUGGESTED TOPICS FOR ARTICLES

- Annual Gifting
- Asset Protection
- Buy-Sell/Shareholder Agreements
- Choosing Your Fiduciary (Trustee and Personal Representative)
- Choosing Your Investment Advisor
- Charitable Lead Trusts
- Charitable Remainder Trusts
- Charitable Tax Planning Ideas - An Overview
- Closely Held Businesses
- Dynasty Trusts
- Elective Share and Other Spousal Entitlements
- Establishing Florida Domicile
- Estate Equalization
- Estate Planning for Blended Families
- Exit Strategies for Family Business
- Family Limited Partnerships and Limited Liability Companies
- Fees of a Fiduciary and its Attorney
- Florida Power of Attorney Act
- Florida's Principal & Income Act
- Florida Trust Code
- Funding Trusts
- Generational Planning with Trusts
- Granter Retained Annuity Trusts
- Guardianship
- HIPAA (Health Care Disclosure) Issues in Estate Planning
- Homestead and Property Tax Issues
- Incapacity Planning
- Income Tax Planning
- International Estate Planning
- Investment Diversification
- IRAs (including Roth), Pensions and other Deferred Compensation
- Joint Ownership - Benefits and Pitfalls
- Life Insurance Trusts
- Life Insurance - when is it necessary
- Lifetime Use of the Applicable Exclusion Amount
- Living Wills and Health Care Surrogates
- Non-Citizen Spouses
- Overview of Estate, Gift and GST Taxes
- Planning for Education
- Planning with Out-of-State Real Property
- Portability
- Post Mortem Planning/Disclaimer Planning
- Probate Process - An Overview
- Qualified Personal Residence Trusts
- Retirement Planning
- Revocable Trusts
- Roth IRAs versus "Regular" IRAs
- Sales to Intentionally Defective Granter Trusts
- Signs of Incapacity
- State Death Tax Issues
- Surviving Spouse's Responsibilities at Death of First Spouse
- Tax Forms - An overview of different fiduciary tax forms
- Tax Ramifications of Improper Planning
- Tax Reform Proposals
- When Should I Review My Estate Plan?

ESTATE PLANNING COUNCIL OF NAPLES, INC.

37th Annual Supplement to the Naples Daily News
for publication on March 6, 2022

ARTICLE SELECTION FORM

Name*: ____

Discipline in Council:

__ Attorney __ CPA __ Financial Planner __ Life Underwriter
__ Trust Officer __ Philanthropic Advisor

Firm: ____

E-mail address: ____

Telephone: ____

Fax: ____

Name(s)*/Discipline(s) of co-authors*: ______________________________________

____

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

1st Choice: ____

2nd Choice: ____

3rd Choice: ____

* **PLEASE WRITE NAME EXACTLY AS YOU WOULD LIKE IT TO APPEAR IN SUPPLEMENT***

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

5:00 P.M. EST, JANUARY 7, 2022.

Please return this form to Marcie Charles by email to:
jstevenson@gfpac.com
with copy to mcharles@gfpac.com