

JOHN J. SCROGGIN, AEP, J.D., LL.M.

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PERSONAL

- Married to Lynn Geiger Scroggin, 1979. 37th Anniversary
- Children: John (Blacksmith), Julie (former Non-Profit Development Director), Justin (Iraq War Veteran)
- Four grandchildren

COMMUNITY WORK

- University of Florida Levin College of Law Board of Trustees, 2011-2016 (Audit Committee & CLE Task Force).
- Founding Member, Board of Trustees, University of Florida College of Law Tax Institute, 2012-present; Executive Committee, 2014-present; Estate Planning Speakers Committee, 2012-present.
- Founding Member, University of Florida Advisor Network.
- Atlanta Philanthropic Advisor Leadership Institute, 4th Class (2012-2013).
- Founding Editor, NAEPC Journal of Estate and Tax Planning (a Publication of the National Association of Estate Planners and Councils) 2006-2010 (www.NAEPC.org).
- National Board of Directors, National Association of Estate Planners & Councils (NAEPC), 2002-2010; Co-Chairman, Long Range Planning Committee 2007-2009; Chairman, Publications Committee, 2006-2010.
- Chairman, NAEPC 2004 National Convention in Atlanta.
- Co-Editor, CCH's Practical Estate Planning magazine, 2003-2005.
- Founding Member of the Board of Directors, Friends of Barrington Hall, Inc.; Founding Chairman, 2008-2012, Vice-President 2012.
- Member, Board of Directors of North Fulton Community Foundation, 2003-2009; Co-Vice Chairman, 2005-2007; Chairman 2007-2009.
- Member, Board of Directors, Historic Roswell Convention and Visitors Bureau, 2004-2016; President's Award, 2011.
- Co-Chairman, Choctawhatchee High School 36th and 40th Reunion.
- Founding Member, Board of Trustees - Atlanta Highlands Church of Christ, 1981-1989.
- Founding Member, Board of Trustees - Center for the Visually Impaired Foundation, Inc., 1989-1992, Vice Chairman, 1990-1992, Chairman, Planned Giving Committee, 1991-1992.
- Member, Atlanta United Way, Planned Giving Committee, 1994-99.
- Member, Roswell United Methodist Church Stewardship Committee, 1996-1999, RUMC Board of Stewards, 1998-2002, RUMC Foundation Advisory Board, 1999-2006.
- 1996 Preservation Award, Roswell Historical Society.
- Advisory Committee for the Roswell Cottage School, 2009-2011.
- Major Sponsor: Roswell Square Concerts in the Park and on the River, 1996-present (21 years).
- Annual Sponsor: North Fulton Community Charities Golf Tournament (2011-present), Roswell Trilogy Crawl (2010-2013), Friends of Barrington Hall (2008-2012), Roswell Rotary Club Golf Tournament (2009- present).
- Roswell Rotary Club; Charity Committee (2006-2009); Paul Harris Fellow; Paul Harris Society Member; Will Watt Fellow, Hue Thomas Fellow; Chairman's Award; Foundation Chair 2009-2010; Sponsor, Roswell Rotary Club Honor Air program, 2009-present; Estate Planning Chair, 2013-2014.
- Legal Advisor: National Rendezvous & Living History Foundation, 2000-2005; Roswell First Baptist Church Endowment, 2007-2009; Alpharetta Arboretum, 2008-2012; Friends of Roswell, 2006-2008; Alpharetta Parks Panthers Football, 2006; North Fulton Orchestra; Roswell Woman's Club; Friends of Barrington Hall; Friends of Smith Plantation, Alpharetta Rotary Club Foundation.
- Advisory Council for the Honorable Dr. Tom Price, Member of the United States House of Representatives 2007-2011.
- Sponsor: Annual University of Florida Law School Atlanta Alumni Luncheons, 1990-2000.

PROFESSIONAL STANDING

- Selected as a 2016, 2015, 2014, 2013, 2012, 2011, 2010 and 2009 "Georgia SuperLawyer," in Atlanta magazine (top 5% of attorneys in Georgia)
- Martindale Hubbell Attorneys' Rating: "AV Preeminent" (highest rating possible) since 1990.
- Selected as a "Five Star Wealth Advisor," 2016, 2015, 2014, 2013, 2011, 2010 and 2009 in Atlanta magazine.
- AVVO Ranking: 10 out of 10 (ranked "Superb").
- Nationally Accredited Estate Planner (AEP Designation), National Association of Estate Planners and Councils.

PROFESSIONAL BACKGROUND

- Attorney, Scroggin & Company, P.C., Atlanta, Georgia, 1990-93, 1994-present; Tax Partner, Glass, McCullough, Sherrill & Harrold, 1993-94; Tax Attorney, Atlanta, Georgia, 1981-89.
- CPA, Arthur Andersen & Co. (tax), Atlanta, Georgia, 1979-1981; AA&Co.'s Nationwide Estate Planning Team.
- Adjunct Professor - Tax Law, University of Florida School of Accounting, 1978-1979.

- Member, Capital Trust Company Attorney Advisory Committee (Delaware), 2004-2006.
- Fidelity Attorney Advisor Network.
- Website Recommended (for Estate Planning) by AICPA Journal of Accountancy, June 2001.
- Certified Financial Planning Board of Examiners Best Planning Article Award for 2000.
- Editorial Board, State Bar of Georgia, Tax Section, 2002-2003.
- Estate Planning Council of North Georgia Board of Directors (2000-2006); Vice President (2001) & President (2002-2005).
- Program Chairman, Georgia Bar ICLE Annual Program on Representing Closely Held Businesses, 1997-2003.
- Member of State Bar of Georgia Total Return Trust Legislation Committee, 2002-2005.
- Estate Planning Columnist, Advisor Today Magazine, 1998-2010; Contributing Writer, National Underwriter (1996-2009).
- Co-Creator of the “Family Incentive Trust”®
- Creator of the “Perpetual Estate Plan”® “Restraint Continuum”® and “Family Love Letter”®
- Owner of one of the Largest Private Collections of Tax Memorabilia in the US.

EDUCATION - Degrees from University of Florida:

- B.S.B.A. - Accounting, 1974
- Juris Doctorate, 1977
- Master of Laws in Taxation, 1979

ADMITTED TO PRACTICE BEFORE

- Supreme Court of Georgia
- United States Tax Court
- United States 11th Circuit Court of Appeals

AREAS OF LEGAL PRACTICE

- Business & Corporate Planning
- Contract Review and Drafting
- Negotiation; Dispute Resolution
- Buy-Sell Agreements
- Creation of Business Entities
- Tax Planning & Estate Planning
- Creation of Trusts
- Business Succession Planning
- Sales of Businesses & Property
- Charitable Entities and Planned Giving
- Probate Administration
- Family Business Planning

PROFESSIONAL AFFILIATIONS

- State Bar of Georgia - admitted 1980
- State Revenues Society
- Buckhead Study Group
- Estate Planning Council of North Georgia
- Florida Bar - admitted 1978
- American Tax Token Society
- Certified Public Accountant, 1981-87
- American Revenues Society
- Atlanta Estate Planning Council
- NAEPC

QUOTED IN NEWSPAPERS:

- Wall Street Journal (1999, 2004, 2005, 2006, 2007, 2009, March 2010, August 2010, April 2015) and the Asian Wall Street Journal (1999)
- The New York Times (2005, 2013, 2014)
- Fort Worth Star Telegram
- South China Morning Post (1999)
- Chicago Sun-Times
- Knoxville News
- New England Financial Journal
- The Miami Herald (2004)
- Houston Chronicle
- Investment News (2006)
- Chicago Tribune (2007)
- Seattle-Post-Intelligencer (2007)
- Baltimore Sun (2007)
- USA Today (August 2014, March 2016)
- Atlanta Journal/Constitution (1999, 2002, 2005, 2010)
- Austin American-Statesman
- The LA Times
- Knight-Ridder Tribune
- Jackson Clarion Ledger (2000)
- Dunwoody Crier (2004, 2005, 2015)
- New York Times International (2005)
- Herald Tribune (2004)
- Palm Beach Post (2006)
- Cleveland Business Journal (2007)
- * Orlando Sentinel (2007)
- * Dallas Morning News (2012)
- * Investor’s Business Daily (2014)
- * Minneapolis Star Tribune (2013)
- * Newsday
- Greenville Herald Banner
- Atlanta Business Chronicle (2001,2007,2015)
- Baltimore Business Journal (2004, 2006)
- Greenwich Times (2005)
- Minneapolis St Paul Business Journal (2005)
- Ventura County Star (2007)
- Colorado Springs Gazette (2007)
- * Dow Jones Investment Wire (2008)
- * Financial Post (2013)

QUOTED IN MAGAZINES:

- Forbes Magazine (1999, 2001, 2012, 2014)
- Money Magazine (1999, 2005, 2015)
- Dow Jones Investment Advisor
- National Underwriter
- Life Association News
- Smart Money Magazine (2003, 2005)
- Advisor Today
- ABA Probate & Property
- Objective Advisor
- Beverage Week (2005)
- Worth Magazine (2005)
- Business to Business (2006)
- More Magazine (2007)
- Retirement Weekly Newsletter (2008; 2014)
- Fortune Magazine (1998, 2000, 2001)
- Image Magazine
- Leads Magazine
- Financial Planning (2005, 2006, 2014)
- Registered Representative Magazine (2001)
- Active Times Magazine
- Fortune Investor
- Investment Advisor
- Bloomberg Personal Finance
- Bank of America Magazine (2004)
- On Wall Street Magazine (2006)
- Physician Personal Advisory Magazine (2006)
- Redbook Magazine (2007)
- Investment News (2008)
- Kiplinger’s (2003, 2011)
- Practical Accountant
- Broker World
- Journal of Financial Services Professionals
- Medical Economics (2000, 2005,2007)
- Secured Retirement
- BNA Estates, Gifts & Trusts Journal
- Journal of Accountancy
- Bloomberg Wealth Management (2004)
- Financial Planning Magazine (2005, 2006, 2014)
- Financial Advisor (2003, 2004, 2005, 2007, 2009, 2010)
- Life Insurance Selling (2007)
- American Bar Association Journal (2007)
- Journal of Financial Planning (2011)

- American Drycleaner (2012)
- American Coin-Op (2012)
- Private Wealth (2012)
- Aqua Magazine (2014)

QUOTED IN OTHER SOURCES:

- Planner Pavilion.com
- Family Giving News (2004)
- MSN Money on Incentive Trusts (2005)
- Lifetime.com on Family Love Letter (2007)
- Profiled in UF Law News on the Family Love Letter (Summer 2006)
- Profiled in Wealth Management Business (2008)
- Financial Planning Association Website (2009)
- Wall Street Journal Website (2009, 2010)
- Kiplingers' Retirement Report on the Family Love Letter (2011)
- Wall Street Journal Complete Estate Planning Guidebook (2011)
- Vermont State Bar Association program on Incentive Trusts (April 2012).
- Grindstone.com on a Favorite Teacher (September 2012)
- Yahoo Finance on Estate Planning Mistakes (May 2013)
- CNBC on the Gandolfini Estate Planning (July 20, 2013)
- ThinkAdvisor.com on Celebrity Estate Planning Mistakes (March 2014).
- RV Pro on Family Business Succession (2014)
- www.msn.com on Tax Collecting (April 2015)
- Value Penguin.com, "Best Cities for Lawyers" (August 2015).
- University of Florida Law School online on Tax Memorabilia (2016)
- Bankrate.com (2000, 2010, 2013)
- CNN Money (2000)
- MSN Lifestyle on Family Love Letter (2007)
- MSNBC (2010)
- Life Health Pro.com (2003, 2005, 2007,2013)
- ModernMedicine.com on the Family Love Letter (2007)
- Kiplingers' Retirement Report on Second Marriage Planning (2008)
- Dow Jones News (April & June 2010)
- AARP Website (2010, 2011)
- LPGASMagazine.com on Buy-Sell Agreements (May 2011).
- AdvisorOne.com on Tax Planning (2012)
- Ultimate Estate Planner.com on Estate Planning in 2012 (2012)
- ThinkAdvisor.com on Estate Planning in 2012 (2012)
- ColumbusCEO.com on the Gandolfini Estate Planning (2013)
- FoxBusiness.com on Estate Planning Fiascos (May 13, 2013)
- www.seniorsguideonline.com (2014)
- New York Observer on the Bunny Mellon Auction (November 2014)
- Wall Street Journal Front Page on his Tax Memorabilia (April 2015)
- Atlanta Business Chronicle on his Tax Memorabilia (October 2015)
- CNBC on the Ramifications of Second Marriages (July 2016)
- Leimberg Information Services
- FinancialCounsel.com (2007)
- AOL News (2007)

INTERVIEWED ON TELEVISION, RADIO AND THE WEB:

- Money Harvest on Estate and Tax Planning for Farmers (1999)
- National Public Radio Marketplace Radio on Incentive Trusts (2002)
- National Public Radio Talk of the Nation on Estate Planning (2004)
- CNN Headline News on the Terri Schaivo Case (March 2005)
- Milwaukee Public Radio "Money Sense" on Estate Planning (July 2007)
- Interviewed for www.marketwatch.com on Medical Directives (July 2009)
- Interviewed on the Wealth Matters Radio show (September 2015) on the Probate Process

SPEAKING ENGAGEMENTS:

- "What Dead Celebrities can Teach us About Estate Planning," National Association of Estate Planners and Councils Annual Conference (Phoenix) November 2016.
- "Trends, Traps and Opportunities," South Carolina Baptist Foundation (Columbia), October 2016.
- "Unique Planning Ideas," Crump Life Insurance (Phoenix) October 2016.
- "What Dead Celebrities can Teach us About Estate Planning," Gulf States Estate Planning Council Annual Meeting (Point Clear), September 2016.
- "Why Heirs should fear a Parent's new Marriage more than the Tax Collector," FPA National Convention (Baltimore), September 2016.
- "What Dead Celebrities can Teach us About Estate Planning," FPA National Convention (Baltimore), September 2016.
- "Estate Planning Update," Southeast Accounting Show, August 2016.
- "What Dead Celebrities can Teach us About Estate Planning," DeKalb Estate Planning Council, August 2016.
- "Update on Estate Planning," Georgia Society of CPAs Annual Estate Planning Conference (Reynolds Plantation), July 2016.
- "What Dead Celebrities can Teach us About Estate Planning," MetLife Annual Meeting (Austin), July 2016.
- "Estate Planning Update," Georgia State Bar Fiduciary Section Annual Meeting (St. Simons Island), July 2016.
- "Unexpected Tax Basis Traps and Opportunities," University of Florida College of Law Tax Institute (Tampa), April 2016.
- "A Potpourri of Tax Planning Ideas and Traps," Northwestern Mutual Insurance (Amelia Island) November 2015.
- "Tax and Estate Planning Issues in Divorce," Orlando Estate Planning Council (Orlando), November 2015.
- "Informative Ways to Reduce Chaos, Conflict and Confusion in Estates," Georgia Society of CPAs, October 2015.
- "Tax Basis Planning: Opportunities and Traps," Florida Bar Tax Section Fall Meeting (Orlando), October 2015.
- "Tax, Estate Planning and Practical Issues in Divorce and Remarriage" American Institute on Federal Taxation (Birmingham) June 2015.
- "Planning for the Average Client," FPA Regional Conference, May 2015.
- "Estate Planning," Georgia Forestry Association (McRae), May 2015.
- "A Potpourri of Tax Planning Ideas and Strategies," Memphis Community Foundation (Memphis), May 2015.
- "A Potpourri of Tax Planning Ideas and Strategies," with Lauren Detzel, University of Florida College of Law Tax Institute (Tampa), April 2015.
- "A few Tax and Estate Planning Traps and Opportunities you may Never have Heard About" Tampa Estate Planning Council (Tampa), April 2015.
- "Changing Demographics are Changing how we do Estate Planning," FPA Retreat 2015 (Chateau Elan) April 2015.
- "Tax Basis Planning," National Association of Estate Planners and Councils Webinar, March 2015.
- "The Top 15 Traps in Estate Planning," Minneapolis Financial Planning Association Annual Meeting (Minneapolis), February 2015.
- "Why Income Tax Planning Trumps Federal Estate Tax Planning," North Georgia Estate Planning Council, January 2015.
- "The Future of Estate Planning," EBA Estate and Business Planning Institute (Evansville, IN), November 2014.

- "Why Income Tax Planning Trumps Federal Estate Tax Planning," Washington State Bar Association Annual Conference (Seattle), October 2014.
- "Tax Basis Planning," Palm Beach Tax Institute (Palm Beach), September 2014.
- "Estate and Income Planning Opportunities and Traps you probably never Knew About," FPA National Convention (Seattle), September 2014.
- "Rethinking Strategies in Light of the Larger Exemption," Georgia Federal Tax Conference, June 2014.
- "Advising Clients about Tax and Estate Planning After 2013," FPA Retreat 2014 (Miami), May 2014.
- "Tax Basis Planning," Interactive Legal Webinar, April 2014.
- "Special Needs Trusts," New York Life, March 2014.
- "Tax Basis Planning," University of Florida College of Law Tax Institute (Tampa), February 2014.
- "Tax Planning Jeopardy," Guardian Life (Newport, RI), September 2013.
- "The Future of Estate Planning, Chattanooga Estate Planning Council (Chattanooga), September 2013.
- "The Future of Estate Planning," Atlanta Bar Association, September 2013.
- "Estate Planning Traps and Tips after 2013," Memphis Inter-Faith Association (Memphis), September 2013.
- "Estate and Tax Planning Update," Southeastern Accounting Show, August 2013.
- "Planning Jeopardy," Georgia Federal Tax Conference, June 2013.
- "Tax Jeopardy," Guardian Life National Meeting (Chicago), June 2013.
- "Planning for the Future of Estate Planning," with Marty Shenkman on Webinar, May 2013.
- "Tax Planning Traps and Tips after 2012," State Bar of Georgia ICLE, April 2013.
- "Recent Tax & Estate Planning Developments," North Georgia Estate Planning Council, March 2013.
- "The Future of Estate Planning," University of Florida Law School (Gainesville), February 2013.
- "The Realities of Family Business Succession," Guardian Life BRC Program (Tampa), February 2013.
- "The Family Love Letter," Cincinnati Young Presidents Club, (Cincinnati), December 2012.
- "State of the Estate and Gift Tax," Georgia Society of CPAs Tax Forum (Savannah & Atlanta), November 2012.
- "Gift Planning 2012," Georgia Society of CPAs Tax Forum (Savannah & Atlanta), November 2012.
- "Basis Planning in 2012," Chattanooga Estate Planning Council (Chattanooga), October 2012.
- "7 Realities of Family Business Succession," Guardian Life Annual Meeting (Philadelphia), September 2012.
- "Planning in 2012," DeKalb Estate Planning Council, September 2012.
- "Estate Planning and Tax Update," Georgia Society of CPAs Annual Estate Planning Conference (Reynolds Plantation). August 2012.
- "Planning in 2012," Wells Fargo Investment Advisors, August 2012.
- "The Family Love Letter," (New York City), June 2012.
- "Business Succession Planning in 2012," (New York City), June 2012.
- "Creative Planning with the \$5M Gift Exemption," Georgia Federal Tax Conference, June 2012.
- "Estate Planning Update," FPA Regional Conference (Atlanta), May 2012.
- "Building a Tax, Business and Estate Planning Practice," University of Florida Levin College of Law LL.M.(tax) Program (Gainesville) March 2012.
- "Creative Planning in 2012," The Dallas Foundation Annual Meeting, (Dallas) January 2012.
- "The Impact of a Return to 2011 on Estate Planning," Linked FA Annual Meeting (Orlando), November 2011.
- "Planning to the End of 2012," Investacorp Annual Estate Planning Conference, October 2011.
- "The Future of Estate Planning," Financial Planning Association Annual Meeting (San Diego), September 2011.
- "Estate Planning Traps and Opportunities 2011-2012," Georgia Forestry Association Quarterly Meeting (Forsyth), September 2011.
- "Upgrading your Basic Planning: A Few Creative Planning Ideas and Traps for the Unwary" Georgia Society of CPAs Annual Estate Planning Conference (Reynolds Plantation). July 2011.
- "Estate Planning Opportunities and Traps, 2011-2012," Georgia Society of CPAs, State-Wide Webinar, May 2011.
- "Traps, Trends and Opportunities in Estate and Tax Planning after 2010," Investacorp Annual National Conference (Tucson), May 2011.
- "20 Insurance Planning Opportunities," LPL Annual Meeting, (Palm Beach), May 2011.
- "Traps, Trends and Opportunities in Estate and Tax Planning after 2010," Wisconsin FPA Annual Meeting (Milwaukee), March 2011.
- "Business Exit Planning," Georgian Bank, February 2011.
- "Creative Planning Ideas," Top Producer's Conference for Investacorp (Orlando), February 2011.
- "Creative Planning after 2010," 2011 Estate Planning Conference for Kovack Securities (Fort Lauderdale), February 2011.
- "Investments and Creative Trust Planning," Investacorp Annual National Conference (Miami) November 2010.
- "Planning in Chaos," Columbus Ohio Community Foundation Annual Meeting (Columbus), October 2010.
- "Planning in 2010 and for 2011," Society of Financial Services Professionals Podcasts on Planning in 2010 (three parts), September 2010.
- "Planning for the Rest of 2010," 25th Annual Society of Financial Services Professionals Southeastern Symposium, September 2010.
- "Using LLCs and LLLPs" Georgia Forestry Association, (Dublin, Georgia) September 2010.
- "Planning in Confusion," Gulf States FPA Annual Meeting (Biloxi), August 2010.
- "Planning for the Rest of 2010," Georgia Society of CPAs Annual Estate Planning Meeting (Reynolds Plantation), July 2010.
- "Tax and Estate Planning for the Next Decade," Georgia Forestry Association Annual Meeting (Amelia Island), July 2010, (Dublin) September 2010.
- "Planning in 2010 and After," DeKalb Estate Planning Council, May 2010.
- "Multi-State Estate Planning – Issues and Opportunities," Philadelphia Estate Planning Council, (Philadelphia) May 2010.
- "Estate Planning in Chaos," Schwab National Webinar, April 2010.
- "Tax Trends, Traps and Opportunities," Georgia FPA Regional Meeting, March 2010.
- "Perspectives on Estate Planning," University of Florida Law School LL.M., (Gainesville), March 2010.
- "Planning in Chaos," Wells Fargo Wealth Advisors, The Dempsey Group, The Milner Group, February 2010.

- “Seven Trends in Estate Planning,” International Forum (Orlando), January 2010.
- “Trends, Traps and Opportunities,” Estate Planning Council of North Georgia, January 2010.
- “The Seven Inevitables in Family Businesses and How to Eradicate Them,” SFSP Arizona Institute (Phoenix) January 2010.
- “Trends in Estate Planning,” Gerber & Co. (Los Angeles), December 2009.
- “Tax & Estate Planning Issues in Divorce,” American Academy of Matrimonial Lawyers Annual Family Law Seminar (Atlanta), December 2009.
- “The Future of Estate Planning,” University of Florida Law School, (Gainesville) November 2009.
- “Trends in Estate Planning,” Philadelphia Financial Planning Association Annual Meeting, Key Note Presentation, (Philadelphia), October 2009.
- “Capitalizing on Personal Trust Trends,” Schwab Impact National Conference (San Diego) September 2009.
- “Exiting the Family Business without Losing your Family or your Retirement,” National Beer Wholesalers Association (Las Vegas) September 2009.
- “Update on Estate Planning,” Capstone (Reynolds Plantation), September 2009.
- “Planning in a Down Economy,” Financial Planning Association Virtual Learning Center, August 2009.
- “Trends in Estate Planning,” Bank of America/Merrill Lynch Wealth Advisors National Conference, July 2009.
- “Planning in Chaos,” Insurance and Financial Leaders of the Southeast (Hilton Head) May 2009.
- “Planning in the Midst of Chaos,” Estate Planning Council of North Georgia, March 2009.
- “Creative Planning,” North Georgia Estate Planning Council (Gainesville), February 2009.
- “Planning for Baby Boomers,” Memphis Estate Planning Council (Memphis), February 2009.
- “Planning for Baby Boomers,” Charlotte Estate Planning Council (Charlotte) January 2009.
- “Influencing the Legacy,” Southwest Florida Estate Planning Council Distinguished Speaker Series (Sarasota) January 2009
- “The Family Love Letter and Leaving a Legacy,” Sarasota Community Foundation (Sarasota) January 2009
- “Avoiding the Inevitable Problems in a Family Business,” International Forum (Los Angeles) January 2009.
- “The 7 Inevitables in Family Businesses and How to Eradicate Them,” MetLife (Los Angeles, Philadelphia, Chicago), January & February 2009.
- “Planning for Business Transfers 2008-2011,” Guardian Life, December 2008.
- “Planning for Baby Boomers,” MetLife Mystery Tour for Top Producers (New York City) October 2008.
- “Planning and the 2008 Election,” Ameriprise Top Producers Program (Hartford), October 2008.
- “Essentials of any Estate Plan,” Schwab Atlanta, October 2008.
- “Planning after the Election,” Financial Planning Association National Convention (Boston), October 2008.
- “Planning after the Election,” National Beer Wholesalers Association Annual Convention (San Francisco), September 2008.
- “Seven Trends Impacting Estate Planning,” Schwab National Impact Meeting (Atlanta), September 2008.
- “Planning after the Election,” Northwest Florida Estate Planning Council (Pensacola) September 2008.
- “Business Succession,” NAIFA Atlanta, August 2008.
- “Estate Planning Concepts,” Houston Financial Planning Association Annual Meeting (Houston) August 2008.
- “What Every Estate Plan Should Include,” Schwab Trust Services (Reynolds Plantation, Palm Springs, San Francisco) May 2008.
- “Estate and Tax Planning in the Chaos of 2008-2011,” Spokane Estate Planning Council Annual Meeting (Spokane) May 2008.
- “The Future of Estate Planning,” University of Florida Law School LL.M. Tax Program (Gainesville) March 2008
- “Estate Planning” Georgia Financial Planning Association Annual Meeting, February 2008.
- “Estate Planning in Uncertain Times,” San Diego Financial Planning Association, (San Diego) February 2008.
- “Estate Planning using Revocable Trusts,” Northern Arkansas Estate Planning Council (Fayetteville) February 2008.
- “Unexpected Uses of Life Insurance in Estate Planning,” MetLife Insurance (San Diego, Chicago, Boston), January 2008.
- “Estate and Tax Planning from 2007-2011 – Confusion Reins,” Gulf States FPA Annual Meeting (Mobile), November 2007.
- “Avoiding 12 Common Estate Planning Mistakes,” National Beer Wholesalers Association Annual Convention (Las Vegas), September 2007.
- “Planning in the Confusion of 2011,” Colorado Springs FPA Annual Meeting (Colorado Springs) September 2007.
- “Multi-Generational Estate Planning,” International Association of Financial Planning National Convention (Seattle), September 2007.
- “Creative Estate Planning,” All Day Pre-Conference Program, FPA National Convention (Seattle), September 2007.
- “Estate Planning for Resident Aliens,” FPA Virtual Learning Center, August 2007.
- “Estate Planning from 2007-2011,” Atlanta Pension Group, August 2007.
- “The Seven Inevitable Problems in a Family Business,” Georgia Forestry Association (Savannah) July 2007.
- “Planning in the Confusion of 2007-2011,” Georgia Society of CPAs Annual Estate Planning Meeting (Callaway) July 2007.
- “Estate and Insurance Planning: Opportunities When Estate Taxes Don’t Matter,” Million Dollar Round Table (Denver) June 2007.
- “Planning from 2007-2011,” Wisconsin FPA Annual Meeting, (Milwaukee) June 2007.
- “Does Income Tax Planning Trump Estate Tax Avoidance?” Northern Arkansas Estate Planning Council (Fayetteville) May 2007.
- “Six Trends Impacting Estate Planning,” Georgia Society of CPAs, May 2007.
- “Estate Planning in the Changing Legal, Demographic and Tax Environment,” Martin County Estate Planning Council (Stuart, FL) May 2007.
- “Multi-State & Multi-Country Estate Planning,” FPA Virtual Learning Center, April 2007; rebroadcast February 2008.
- “A Return to 2001?” North Michigan Estate Planning Council (Saginaw), April 2007.
- “Does Income Tax Planning Trump Estate Tax Avoidance?” St Louis Estate Planning Council (St. Louis) April 2007.
- “Planning for the Sale or Purchase of a Business,” FPA Virtual Learning Center, March 2007
- “Does Income Tax Planning Trump Estate Tax Avoidance?” BDO Accounting Firm Southeast Annual Meeting, January 2007.
- “The Future of Estate Planning,” Naples Estate Planning Council, (Naples, FL), January 2007.
- “Does Income Tax Planning Trump Estate Tax Avoidance?” Philadelphia Estate Planning Council (Philadelphia), January 2007.
- “Reviewing Estate Planning Documents – a Practical Approach,” Best of the Year FPA VLC Program, December 2006.
- “Innovative Planning Ideas,” Chattanooga Estate Planning Council (Chattanooga) November 2006.

- “Does Income Tax Planning Trump Estate Tax Avoidance?” Atlanta Estate Planning Council, November 2006
- “The Future of Estate Planning (3 hours),” Salt Lake City Estate Planning Council (Salt Lake), November 2006.
- “Reviewing Estate Planning Documents – a Practical Approach,” FPA National Convention (Nashville), October 2006. – top rated presentation
- “Estate Planning War Stories,” The Milner Group, October 2006; December 2006.
- “The Future of Estate Planning,” AXA Planning Conference (Philadelphia), September 2006.
- “The Seven Inevitable Problems in a Family Business,” National Beer Wholesalers Association National Convention (Orlando), September 2006.
- “Thirty Innovative Planning Ideas,” Central Ohio FPA (Columbus) August 2006.
- “Innovative Planning Ideas,” AXA Estate Planning Conference (Wisconsin), August 2006.
- “Influencing the Legacy,” AXA Estate Planning Conference, July 2006.
- “Does Income Tax Planning Trump Estate Tax Avoidance?” Georgia Tax Conference, June 2006.
- “The Future of Estate Planning,” Red River Estate Planning Council (Fargo) April 2006; AXA Planning Conference, May 2006.
- “Innovative Planning Ideas,” North Alabama Estate Planning Council (Birmingham) March 2006.
- “Family Business Succession,” The Milner Group, March 2006.
- “Does Income Tax Planning Trump Estate Tax Avoidance?,” State Bar of Georgia Estate Planning Institute (Athens) February 2006.
- “The Future of Estate Planning,” Georgia Financial Planning Association Annual Meeting, February 2006.
- “Innovative Insurance Planning Ideas,” The Milner Group, January 2006.
- “Innovative Planning Ideas,” Denver Financial Planning Association (Denver) November 2005.
- “Innovative Planning Ideas,” Fort Worth Society of Financial Services Professionals (Fort Worth), November 2005.
- “Planning when the Estate Tax Does Not Matter,” College for Financial Planning Fall Tape Series, November 2005.
- “The Changing Nature of Estate Planning,” Detroit Estate Planning Council Half Day Program (Detroit) November 2005.
- “A Humorous Review of Taxes,” Detroit Estate Planning Council (Detroit) November 2005.
- “Planning for the Aftermath of Hurricane Katrina,” FPA Virtual Forum, November 2005 (2 Sessions).
- “Avoiding Common Mistakes in Creating, Operating and Transferring a Business,” Society of Financial Services Professionals National Convention (Phoenix) October 2005.
- “Non-Tax Issues in Estate Planning,” Atlanta Bar Association, Estate Planning Section, October 2005.
- “Planning for the Aftermath of Hurricane Katrina,” FPA Virtual Forum, October 2005.
- “The Changing Nature of Estate Planning and its Impact on Charities,” Georgia Planned Giving Council, September 2005.
- “Transferring your Business without Losing Your Shirt and Your Family,” NBWA Annual Convention (Las Vegas) September 2005.
- “Hot Topics in Estate Planning,” Financial Planning Association National Convention (San Diego), September, 2005.
- “Minimizing Conflicts in Estate Planning: Insurance and Other Solutions” Financial Planning Association National Convention ½ Day Pre-Conference (San Diego), September, 2005.
- “Does Income Tax Planning Trump Federal Estate Tax Avoidance?” Estate Planning Council of Winston Salem (Winston Salem) September 2005; Central Florida Financial Planning Association Annual Meeting (Tampa) July 2005; Wellstar Annual Estate Planning Program, August 2005.
- “Estate Defective Trusts,” Commerce Clearing House Continuing Education Program, Summer/Fall 2005.
- “How Legislative Changes are Changing Estate Planning,” Atlanta NAIFA Annual Meeting, July 2005.
- “Innovative Planning Ideas,” Phoenix Financial Planning Association (Phoenix) May 2005.
- “Medical Decision Making in Georgia,” Atlanta. May 2005.
- “The Family Love Letter,” Enterprise Group of Funds, May 2005; Morgan Stanley, June 2005; Enterprise, June 2005.
- “Estate Planning is not Dying, It’s Just Evolving,” Society of Financial Services Professionals Conference (Fort Worth) May 2005.
- “Avoiding Common Mistakes in Estate Planning,” Financial Planning Association Virtual Forum, April 2005.
- “How to Transfer Your Business Without Losing Your Shirt and Your Family,” Society of Financial Services Professionals Arizona Institute (Tucson) January 2005.
- “The Family Love Letter,” Morgan Stanley, November 2004; (Colorado Springs) November 2004; (Dallas) August 2004.
- “Estate Defective Trusts,” Wilmington Delaware Estate Planning Council (Wilmington), November 2004; Dekalb Estate Planning Council.
- “Influencing the Legacy,” National Association of Estate Planners & Councils Convention, October, 2004.
- “Does Income Tax Planning Trump Estate Tax Planning?” National Association of Estate Planners & Councils Convention, October, 2004.
- “Planning with Trusts,” Wilmington Trust (September 2004).
- “Avoiding Common Businesses Mistakes,” Financial Planning Association National Convention (Denver), September, 2004.
- “The Creative Use of Trusts,” Financial Planning Association National Convention, Pre-Convention Program (Denver), Sept. 2004.
- “Avoiding Common Mistakes in Estate Planning,” (Dallas), August 2004.
- “Technology and Estate Planning,” Estate Planning Council of North Georgia, April 2004.
- “Why Every Client Should Plan for Incapacity,” Financial Planning Association Virtual Forum, March 2004.
- “Ethics,” Women in Financial Services, February 2004.
- “Influencing the Legacy,” FPA Success Forum (Philadelphia), November 2003; Partners Financial (Chicago), September, 2003.
- “Passing the Family Business,” & “Recent Changes Impacting Closely Held Businesses,” State Bar of Georgia ICLE (Program Chair), October 2003.
- “Planning for the Business Owner (4 Programs),” Synovus Bank, October and November 2003.
- “Client Centered Collaboration Panel Discussion,” FPA Success Forum (Philadelphia), November, 2003.
- “The Changing Nature of Estate Planning,” FPA Success Forum ½ Day Pre-Convention Program (Philadelphia) November, 2003.
- “Fundamental Estate Planning,” National Beer Wholesalers Convention (Las Vegas), October, 2003; South Carolina Beer Wholesalers (Charleston), July 2003; Florida Beer Wholesaler’s Convention (Destin), October 2003.
- “Planning for Divorce,” FPA Tape Series, Summer 2003.
- “The Changing Nature of Estate Planning,” Estate Planning Council of Mississippi (Jackson), February 2003; Texas Society of CPAs Advanced Estate Planning Conference (Austin) August 2003; Gwinnett Estate Planning Council, May, 2003; Partners Financial (Chicago), September, 2003;

FPA Success Forum Pre-Conference Program (Philadelphia), November, 2003; Cobb Community Foundation, December 2003.

- "Ethics," Atlanta NAIFA Annual Meeting, July 2003.
- "Planning When Taxes Don't Drive the Process," Florida FPA (Tampa) June 2003.
- "Protecting and Preserving Family," FPA Tape Series, Fall 2002.
- "Avoiding Mistakes in Buy-Sell Agreements," State Bar of Georgia ICLE (Program Chair), December 2002.
- "Have We Gotten Estate Planning Wrong All These Years?" WellStar Foundation Annual Seminar, September 2002.
- "Innovative Planning," (Naples) Florida FPA, June 2002, (Des Moines) July 2002, (Salt Lake), August 2002.
- "Estate Planning After the 2001 Tax Bill," FPA of Georgia Regional Conference, May 2002.
- "Planning for Business Owners," FPA National Retreat (Houston), April 2002.
- "The Family Love Letter," (Reynold's Plantation), April 2002; (San Diego) June 2002.
- "Estate Planning Today," Georgia State University MBA Program, March 2002.
- "Insurance Planning for 2001 and Beyond," Financial Services Corp Annual Meeting, October, 2001; Partners Financial (Chicago), September 2001; Hemisphere Group (Washington), October 2001.
- "Recent Changes Affecting Closely Held Businesses," State Bar of Georgia ICLE (Program Chair), September 2001.
- "2001 Tax Update," College for Financial Planning (Orlando & La Jolla) June & October 2001, Partners Financial (Austin) 2001; NAIFA Atlanta, August 2001;
- "Estate Planning After the 2001 Tax Bill," Fall, 2001 FPA Tape Series, Financial Planning Association Annual Meeting (San Diego), September, 2001; FPA Virtual Forum, November 2001; Enterprise Group of Funds (Saratoga Springs, Toledo), 2001; Wellstar Annual Meeting, September, 2001; ING Group, September, 2001.
- "What's New in Washington," NAIFA Annual Meeting (Philadelphia), April 2001; Canada Life Annual Meeting, May 2001; Milner Group, Summer 2001.
- "Planning to Protect & Preserve Family," Canada Life Annual Meeting, May 2001.
- "Primer on Estate Planning," Oglethorpe University, February 2001; Morgan Stanley Annual Meeting, (Miami) May 2001.
- "Business Succession Planning - Thinking Outside the Box," Partners Financial (Austin), January 2001.
- "Family Incentive Trusts," Central Texas Estate Planning Council (Austin), January 2001; Atlanta Estate Planning Council, May 2001; Wisconsin FPA & CPA Annual Symposium (Milwaukee), May 2001; Louisville Estate Planning Council (Louisville), September 2001; Enterprise Group of Funds (Austin), February 2001; Milner Group (Savannah, Macon, Columbus, Augusta), March, April 2001.
- "Innovative Planning Ideas," Financial Services Corp; Enterprise Group of Funds, 2001.
- "Planning for the Affluent," and "Planning for the 21st Century," Partners Financial Annual Meeting (Chicago), September 2000.
- "Family Incentive Trusts," Estate Planning Council of Mississippi (Jackson), November 2000; Children's Hospital of San Diego (San Diego), November 2000; Financial Network Investment Corp. Annual Meeting, (San Diego) July 2000; Tri-State FPA Annual Meeting (Philadelphia) May 2000; Wealth Solutions Management Seminar (San Jose), March 2000.
- "Asset Protection Planning," University of Florida Law School, Graduate Tax Program (Gainesville), June 2000.
- "Unique Marketing Approaches," NAILBA (Washington), November 2000; Financial Services Corporation, June 2000.
- "Business Succession Planning," Atlanta Life Underwriters Education Expo, August 2000.
- "Planning for the Transfer of a Closely Held Business," State Bar of Georgia; (Program Chair) September, 2000.
- "Planning in the 21st Century," Canada Life National Meeting, May 2000.
- "20 Innovative Planning Ideas," Canada Life National Meeting, May 2000.
- "Planning for the Affluent Client," National Underwriter, AALU Annual Meeting (Washington), May 2000.
- "Mid-Year Tax Planning Update," NAIFA Annual Meeting (Dallas), May 2000.
- "Business Continuation Planning" and "Business Succession Planning" FPA Annual Retreat, (Phoenix) April 2000.
- "Family Incentive Trusts," National Underwriter, (Cincinnati) 1999; First Financial Resources Annual Meeting, 1999; CUNA Mutual Group Annual Meeting, 1999; North Carolina SFSP Annual Meeting (Charlotte), 1999; Mid-South ChFC Annual Meeting (Memphis), 1999; InSouth Insurance, 1999; Financial Services Corp. Annual Meeting, 1999; Atlanta Life Underwriters Education Expo, 1998; International Association for Financial Planning, National Convention, 1998 (Salt Lake City); Atlanta ChFC Chapter 1998; Ascensus Insurance Services, 1998 (Salt Lake City); Gwinnett Estate Planning Council, 1998; Family Wealth Counselors Convention (Chicago), 1998; Society for Senior Risk Managers (Charleston), 1998.
- "Planning for the New Millennium," College for Financial Planning, National Conference (Denver), 1999; North Carolina SFSP Annual Meeting (Charlotte), 1999.
- "Fundamental Estate Planning," Atlanta Journal/Constitution Money & More Annual Program, 1999.
- "Business Succession Planning," State Bar of Georgia; (Program Chair) September 1999.
- "Planning for the Elderly," The Society of Senior Risk Managers (Dallas), 1999.
- "Creative Planning Ideas," Mid-South ChFC Annual Meeting (Memphis), 1999; Enterprise Group of Funds, 1999; CLU Seminar (Charlotte), 1999; Financial Services Corp. Annual Meeting, 1999.
- "Innovative Planning for the Elderly," The Society of Senior Risk Managers (Charleston), 1999.
- "What's New in Washington -1999," Milner Group; Atlanta Life Underwriters Expo.
- "Basic Planning for the Elderly," The Society of Senior Risk Managers (Charleston), 1998.
- "A Debate on Charitable Reverse Split-Dollar Insurance," Atlanta Life Underwriters, November 1998.
- "The 1997 Tax Act," IAFP, National Convention (Salt Lake City), 1998.
- "Professionalism in Representing the Small Business Owner," State Bar of Georgia; Program Chair, 1998.
- "Planning from Different Perspectives," Atlanta Life Underwriters Education Expo, 1998.
- "What's New in Washington - 1998," The Milner Group; Atlanta Life Underwriters Expo; Braden Financial
- "Estate Planning," U.S. - Philippine Chamber of Commerce Annual Convention, 1998.
- "Using Trusts," Elder Law Council, National Business Institute, 1997.
- "What's New in Washington - 1997," IAFP, National Convention, 1997 (Orlando).

- "Post-Creation Matters" State Bar of Georgia ICLE, 1992, 1996 & 1997.
- "Planning with the New Tax Law," Subcenter National Meeting, 1996 (Kiwi Island).
- "Limited Liability Companies," National Business Institute, 1995.
- "Valuation Issues in an Estate" and "Pre-Mortem Tax Planning," National Business Institute 1994.
- "Using Limited Liability Companies," Atlanta, Georgia, May, June, and October, 1994.
- "Tax Planning for Insurance Agents," 1993.
- "Estate Planning for Retirement Plans," 1993.
- "Family Limited Partnerships," The Milner Group, 1993.
- "Use of Trusts - a Few Examples," First Union National Bank, 1993.
- "Trusts in Estate Planning," The DeKalb County Estate Planning Council, 1993.
- "Use of Trusts in Georgia," National Business Institute, 1993.
- "Pre-Mortem Planning" and "Post-Mortem Planning," National Business Institute, 1992.
- "Independent Contractors," 1991 REMAX of Georgia Broker/Owner Retreat, 1991.
- "Business and Tax Planning for a Professional," and "Working with Attorneys," Southern Council of Optometrists, 1991
- "Basic Business Organizations - Operations", DeKalb/Decatur Bar Association, 1991.
- "Unusual Aspects of Estate Administration in Georgia," National Business Institute, 1991.
- "Tax Considerations in Estate Administration," National Business Institute, 1991.
- "Practical Estate Planning," American General Life Insurance, Georgia Conference, 1991.
- "Wills, the Essentials" and "Trusts for the Aged and Incapacitated," 1990.
- "Unique Planning Ideas," North Carolina Society of CPAs, 1990.
- "Long Term Health Care Planning for the Elderly," 1990.
- "Tax Planning for Estates in Georgia," National Business Institute, 1990.
- "Estate Administration in Georgia," National Business Institute, 1990.
- "Planning for the Elderly and Terminally Ill," 1989.
- "Post Mortem Elections by Fiduciaries," Beyond the Basics, 1989.
- "Current Issues and Recent Development in Estate Planning," 1987.

PUBLICATIONS – White Papers & Booklets

- The Family Love Letter, AXA Advisors and Enterprise Group of Funds, 2002, Second Printing 2005; Third Printing, 2006. Fourth Printing 2007; Fifth Printing 2008; Sixth Printing 2009; Seventh Printing 2010; Eighth Printing, 2011; Ninth Printing, 2012; Tenth Printing 1013; Copyright and Trademark Licensed to AXA and Neuberger Berman.
- The Use of REITs in the Estate, Family and Business Planning of Beverage Distributors, First Beverage Group, 2006.
- Building an Estate Planning Practice, Oppenheimer Funds, 2010.

PUBLICATIONS - Books

- Co-Author (3 chapters), Leimberg Library, Income Tax Planning, National Underwriter, 2016.
- Family Incentive Trusts, National Underwriter, 1999.
- Stewardship, a Self-Study Guide, Milliken Press, 1986.
- Tax and Financial Planning for Ministers, A Practical Analysis, Milliken Press, 1984.

PUBLICATIONS –Articles (being completed):

- "A Primer on S Corporation Tax Basis Issues," Leimberg Estate Planning newsletter, Fall 2016.
- "Simple Ways to Reduce the Potential for Estate Conflict," Wealth Management, Fall 2016.
- "The Perils of Ascertainable Standards," Leimberg Information Services, Fall 2016.

PUBLICATIONS –Articles:

- "What Dead Celebrities can Teach Us about Estate Planning," Leimberg Estate Planning newsletter, December 2016.
- "What Dead Celebrities can Teach us about Estate Planning," Journal of Financial Planning, Fall 2016, Parts One and Two.
- "Divorce Negotiations from the Perspective of an Estate Planning Attorney," Estate Planning Magazine, November 2016; republished in the NAEPC Journal of Estate and Tax Planning, Winter 2017 at www.NAEPC.org.
- "Eliminating Spousal Rights," Estate Planning Magazine, April 2016.
- "Spousal Rights in Remarriage," Estate Planning Magazine, February 2016.
- "Estate Planning Implications of Remarriage," Journal of Financial Planning, February 2016.
- "Divorce Negotiations from the Perspective of a Tax & Estate Planning Attorney," Merrill Anderson Estate Planning Studies, January 2016.
- "A Potpourri of Tax and Estate Planning Traps and Opportunities," Merrill Anderson Estate Planning Studies, June 2015.
- "Tax, Estate Planning and Practical Issues in Divorce and Remarriage" LISI Tax Planning Newsletter, July 2015; republished in the NAEPC Journal of Estate and Tax Planning, Winter 2016 at www.NAEPC.org.
- "A Potpourri of Tax and Estate Planning Traps and Opportunities," Co-Authored with Lauren Dentzel, LISI Estate Planning Newsletter, Spring 2015.
- "Tangible Personal Property: The Most Forgotten Part Of An Estate Plan?" Merrill Anderson Estate Planning Studies, April 2015.
- "Tangible Personal Property: The Most Forgotten Part Of An Estate Plan?," Co-Authored with Michael Burns, LISI Estate Planning Newsletter, February 21, 2015; republished in Florida Bar State to State Magazine, Spring 2014/2015.
- "Income Tax Planning for Clients with Shorter Life Expectancies," WG&L/RIA Practical Tax Strategies, May 2014; republished in

<http://www.wealthstrategiesjournal.com> (2014) ; republished in the NAEPC Journal of Estate and Tax Planning, Summer 2014 at www.NAEPc.org; republished in Estate Planning Magazine, November 2014; republished in Florida Bar State to State Magazine, Winter 2014/2015.

- "Tax Basis Planning," Merrill Anderson Estate Planning Studies, April 2014.
- "Tax Basis Planning - the Basics," Co-Authored with Michael Burns, LISI Estate Planning Newsletter #2194, February 11, 2014; republished in the NAEPC Journal of Estate and Tax Planning, Spring 2014 at www.NAEPc.org; republished in <http://www.wealthstrategiesjournal.com> (2014) republished in Florida Bar State to State Magazine, Spring 2015.
- "Understanding Section 1014(e) and Tax Basis Planning," LISI Estate Planning Newsletter #2192, February 6, 2014; republished in the NAEPC Journal of Estate and Tax Planning, Spring 2014 at www.NAEPc.org; republished in <http://www.wealthstrategiesjournal.com> (2014).
- "Tax Complexity, History and Humor," Leimberg Information Services Income Tax Planning Newsletter #42, April 15, 2013; republished in the NAEPC Journal of Estate and Tax Planning, Summer 2013 at www.NAEPc.org; republished in <http://www.wealthstrategiesjournal.com> (2014).
- "Where is the Estate Planning Profession Going?" Merrill Anderson Estate Planning Studies, July 2013.
- "Where is the Estate Planning Profession Going?" Leimberg Information Services Estate Planning Newsletter #2081, March 25, 2013; republished in the NAEPC Journal of Estate and Tax Planning, Spring 2013 at www.NAEPc.org; republished on the Society of Financial Services Professionals Website; republished in <http://www.wealthstrategiesjournal.com/> (June 2014).
- "Planning for the Terminally Ill in 2012," RIA-WG&L Tax Watch, Summer 2012 (3 part series); republished RIA Estate Planners Alert, Summer 2012.
- "Transfer Tax Planning in 2012," Georgia Society of CPAs Newsletter, May 2012.
- "Planning in 2012 for Clients with Shorter Life Expectancies," Leimberg Information Services Estate Planning Newsletter #1967, May 29, 2012; Republished by the Financial Planning Association on www.fpanet.org, in June 2012; Republished by the Asset Protection Society on www.assetprotectionsociety.org in June 2012; Revised and Republished in Leimberg Information Services Estate Planning Newsletter #1987, July 17, 2012; Republished in the NAEPC Journal of Estate and Tax Planning, Summer 2012 at www.NAEPc.org; Republished in Linked-In Discussion Groups, July 18, 2012.
- "Eight Realities in Family Business Succession," Leimberg Information Services Estate Planning Newsletter #1932, March 2012; Republished in the NAEPC Newsletter, March 2012 and as a part of the American College curriculum; republished in <http://www.wealthstrategiesjournal.com> (2014).
- "The Future of Estate Planning," NAEPC Journal of Estate and Tax Planning, March 2011.
- "Gifting in 2010," (a three part series), Howard Zaritsky's Estate Planning Update and RIA Tax Watch, July 2010.
- "Should Clients Consider Gifting in 2010?" (with Charlie Douglas), NAEPC Journal of Estate and Tax Planning, Fall 2010.
- "Should Clients Consider Gifting in 2010?" (with Charlie Douglas), Leimberg Information Services Newsletter #1668, July 2010.
- "The Future of the Estate Planning Business," Leimberg Information Services Newsletter #1657, June 2010.
- "Sample Client Letter on Planning in 2010 and 2011," NAEPC Journal and Leimberg Information Services Newsletter, February 2010.
- "Taxes are Going Up," Advisor Today, December 2009.
- "Smaller Exemptions or a Return to 2001? A Contrarian's View," Leimberg Information Services Newsletter #1521, September 2009.
- "Planning for What Happens Next," NAEPC Journal of Estate and Tax Planning, Editors Column, June 2009.
- "Estate Planning – Its all about the Legacy," Wall Street Journal website, March 2009.
- "What Comes Next?" Advisor Today, March 2009.
- "Complexity of the Code," NAEPC Journal of Estate and Tax Planning, Editors Column, January 2009.
- "Creative Uses of the Annual Exclusion," Advisor Today, August 2008.
- "Unexpected Consequences of the Baby Boomers," NAEPC Journal of Estate and Tax Planning, Spring 2008
- "Effectively Using the Annual Exclusion," Advisor Today, June 2008.
- "Unintended Consequences of the Baby Boomers," National Underwriter, April 2008.
- "Using Revenue Ruling 2007-13 to Fix Defective Insurance Trusts?" Advisor Today, February 2008.
- "Seven Realities of Family Business Succession," Life Insurance Selling, January 2008.
- "Conflict and Estate Planning," NAEPC Journal of Estate and Tax Planning Editor's Column, December 2007.
- "Do your Clients Need to Move their Life Insurance before the End of 2007?" Advisor Today, November 2007.
- "Estate Tax Fixes Before 08." Registered Representative Newsletter, November 28, 2007; republished in www.wealthmanagement.com
- "Using Revenue Ruling 2007-13 to Fix Defective Insurance Trusts," National Underwriter, September 3, 2007.
- "Medical Directives," NAEPC Journal of Estate and Tax Planning, July 2007.
- "Estate Planning to Cope with the Current Legislative Uncertainty" Estate Planning magazine, May 2007; Republished in NAEPC Journal of Estate and Tax Planning, December 2007.
- "Liquidity Planning & Permanent Estate Tax Reform," National Underwriter, April 2007.
- "Dealing with the Seven Inevitables of Family Businesses," Journal of Practical Estate Planning, March 2007; Republished in CCH's Estate and Financial Planning, April 2007 in Volume 3 republished by The American College, 2008-2010.
- "A Return to 2001- the Impact of the Election," National Underwriter, November 2006; reprinted in AIG Focus Life Carriers Newsletter 2007.
- "The Return of 2001?" Advisor Today, November 2006; NAEPC Journal of Estate and Tax Planning, October 2006.
- "Seven Realities of Family Business Succession," NBWA Newsletter, March 2006.
- "Six Realities of Family Business Succession," Advisor Today, February 2006.
- "Life Insurance and Business Succession," Journal of Financial Service Professionals, January 2006.
- "The Importance of Basis Planning," Advisor Today, November 2005.
- "What Happens When Federal Estate Taxes Don't Matter?" Advisor Today, (two parts) September – November 2005.
- "Medical Decision Making," ABA Practical Lawyer, August 2005.
- "Income Tax Planning Now that Estate Taxes are Less Significant" Estate Planning magazine, June 2005.
- "Medical Decision Making in Georgia," Georgia Bar Journal, June 2005.
- "Common Mistakes in Creating, Operating and Transferring a Business," Society Page for SFSP, Summer 2005.

- "The Increased Importance of Basis Planning," Estate Planning Newsletter, Society of Financial Services Professionals, May 2005.
- "Medical Decision Making," Advisor Today, May 2005.
- "The Brave New World of Basis Planning," Trusts and Estates, April 2005; republished in www.wealthmanagement.com
- "How to Create Liquidity, without Going Broke," NBWA Newsletter, January 2005.
- "Other Tax Planning Trumps Estate Tax Avoidance," National Underwriter, February 2005.
- "Are ILITs Still Viable?" (Two Parts) Advisor Today, January and February 2005; Republished in the Life & Health Section Newsletter of the Society of Financial Services Professionals. Summer 2005.
- "Estate Defective Trusts," Taxes Magazine, January 2005, republished in Practical Estate Planning, April 2005.
- "Estate Defective Trusts," National Underwriter, January 2005.
- "Fundamental Estate Planning," Advisor Today, November 2004.
- "Dynasty Trusts," Advisor Today, August 2004.
- "The Changing Nature of Estate Planning - The Use of Trusts," CCH Practical Estate Planning, August 2004; Republished in CCH's [Estate and Financial Planning](#).
- "Avoiding Gift Problems," Advisor Today, June 2004.
- "Planning for the Basis of Assets," National Underwriter, June 14, 2004; Republished in the Life & Health Section Newsletter of the Society of Financial Services Professionals.
- "Influencing the Legacy," Advisor Today, April, 2004.
- "Post-Creation Checklist for Georgia Business Entities," Georgia Bar Journal, April 2004.
- "The Changing Nature of Estate Planning - Divorce & Conflict," CCH Practical Estate Planning, March 2004; Republished in CCH's [Estate and Financial Planning](#).
- "Avoiding Mistakes in Buy-Sell Agreements," NBWA Beer Perspectives, February, 2004.
- "Fewer Taxable Estates Will Create Profound Changes," National Underwriter, December 2003.
- "The Changing Nature of Estate Planning - Influencing the Legacy" CCH Practical Estate Planning, December 2003; Republished in CCH's [Estate and Financial Planning](#), paragraph 32,621 of Volume 3.
- "Planning to Influence the Behavior of Heirs," FPA Journal of Financial Planning, November 2003.
- "Avoiding Mistakes in Buy-Sell Agreements (two parts)," Advisor Today, Fall 2003 and Winter 2004.
- "Influencing the Legacy," The Community Foundation for Greater Atlanta Newsletter, Fall 2003.
- "It's Not About the Dead and Their Taxes," Advisor Today, October, 2003.
- "Planning for Divorce (3 parts)," Society of Financial Services Professionals Retirement Counseling Newsletter, Fall 2003.
- "Five Realities of Family Business Succession," Society of Financial Services Professionals Business Planning Newsletter, Fall 2003.
- "The Changing Nature of Estate Planning - The Fundamentals" CCH Practical Estate Planning, June 2003; Republished in CCH's [Estate and Financial Planning](#), August, 2003 at paragraph 32,571 of Volume 3.
- "The Jobs and Growth Tax Relief Reconciliation Act of 2003," National Underwriter, June 2003; Reprinted NBWA, Summer 2003.
- "Planning & Divorce," (3 parts) Advisor Today, February, May, & July 2003.
- "Avoiding Mistakes in Buy-Sell Agreements," ABA Practical Lawyer, June 2003; Republished in the American Bar Association, [Practice Checklist Manual on Advising Business Clients, III](#); Republished in AICPA [Selected Readings - Management of a Practice](#).
- "Protecting and Preserving the Family - the True Goal of Estate Planning (2 parts)," Broker World, March & April 2003.
- "Restraining an Inheritance can Accomplish a Client's Objectives," WG&L Estate Planning Magazine, March 2003.
- "Planning for Divorce (2 parts)," WG&L Practical Tax Strategies, December 2002 and January 2003.
- "The Family Love Letter," CCH Practical Estate Planning, December 2002/January 2003.
- "The Restraint Continuum," Advisor Today, January 2003.
- "The Changing Nature of Estate Planning," National Underwriter, December 2002.
- "Techniques for the New Estate Plan," Investment Advisor, December 2002.
- "Planning for Divorce," National Underwriter, November, 2002.
- "All in the Family," Investment Advisor, October 2002.
- "Reducing Conflicts in the Estate Plan," Advisor Today, September 2002.
- "Transfers to Minors," National Underwriter, August 2002.
- "Handing Over the Family Business," Advisor Today, July 2002.
- "Protecting and Preserving the Family - the True Goal of Estate Planning (2 parts)," ABA Real Property, Probate and Trust Journal, Spring and Summer, 2002; Georgia Planned Giving Council Newsletter, 4th Quarter, 2002
- "The Restraint Continuum," National Underwriter, June 2002.
- "Innovative Insurance Sales," NAILBA Magazine, Winter 2002.
- "Time for Review, 2002," (3 parts) Brokers World, March-May 2002.
- "Some Interesting Aberrations in the 2001 Tax Bill," Advisor Today, January 2002; Georgia Planned Giving Council Newsletter.
- "Personal Property: The Forgotten Part of the Estate Plan," CCH Practical Estate Planning, February/March 2002.
- "Protecting the Buyer of a Business," CCH Business Strategies Bulletin, January, 2002.
- "Elimination of the Estate Tax?" Advisor Today, January 2002.
- "Protecting the Seller of a Business," CCH Business Strategies Bulletin, December, 2001.
- "Will the Estate Tax be Eliminated?" The Georgia Planned Giving Council Newsletter, December, 2001.
- "Four Realities of Business Succession," CCH Business Strategies Bulletin, November, 2001.
- "Found Money," The Georgia Planned Giving Council Newsletter, 3rd Quarter, 2001.
- "Estate Planning After the 2001 Tax Bill," National Underwriter, July, 2001.
- "Effectively Using the Annual Exclusion," AICPA Tax Advisor (2 parts), June & July 2001.

- "Effectively Using the Unified Credit," National Underwriter, April 2001.
- "Planning to Protect and Preserve the Family," Advisor Today, January 2001.
- "Hang on Advisors, Its Going to be a Bumpy Tax Ride," National Underwriter, January 2001.
- "What to Do Till the Tax Fog Passes," National Underwriter, January 2001.
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- "Choosing a Trustee: A Practical Approach," Advisor Today, October 2000.
- "War Stories in Estate Planning," National Underwriter, October 2000.
- "Unique Marketing Ideas," NAILBA Magazine, September 2000.
- "The Family Incentive Trust," Journal of Financial Services Professionals, July 2000.
- "Tis Better to Give," Financial Planning (3 parts), July-September 2000.
- "Personal Property - The Forgotten Part of the Estate Plan," Advisor Today, July 2000.
- "Family Incentive Trusts," Insights and Strategies, June 2000.
- "Mid-Year Planning," Financial Planning, June 2000.
- "Two Realities in Estate Planning for a Business Owner," Advisor Today, May 2000.
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- "Common Estate Planning Errors," National Underwriter, January 2000.
- "Elimination of the Estate and Gift Tax?" Advisor Today, January 2000.
- "Changing Estate Planning," Life Association News, June, 1999.
- "Planning for Incapacity," National Underwriter, February 1999.
- "The Family Love Letter," ABA Practical Tax Lawyer, Winter 1999.
- "The Crummey Power," Life Association News, January 1999.
- "Rich But Not Idle," Financial Planning, November 1998; Bank Investment Marketing, February 1999.
- "A Time for Review," Broker World, October 1998; Leads Magazine 1999.
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- "Post-Incorporation Checklist for Georgia Corporations," The Atlanta Lawyer, Fall 1991.
- "An Estate Planning Checklist for Clients Facing Disability or Terminal Illness," Trusts & Estates, Winter 1991.
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