

TOPICS FOR PRESENTATIONS

(effective December 5, 2013)

Speaker: JOHN J. (“Jeff”) SCROGGIN, AEP, J.D., LL.M.

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Speaker Bio: Mr. Scroggin’s speaking credentials are provided at the end of this material. A more detailed Bio and list of prior speaking engagements are available at Mr. Scroggin’s website: www.scrogginlaw.com.

Cost: Reimbursement of Out of Pocket Expenses; Fees are Based upon the Program. Contact Jeff for more information.

Presentations: Mr. Scroggin is known for his ability to convert complex, technical information into practical, useable forms and for sprinkling his presentations with humorous information and quotes on the speech topic. All presentations use PowerPoint and normally include detailed handouts for participants to use as a future resource. All materials and the presentations stress the practical and take a “solutions orientation” to the planning process. Numerous examples are used to highlight the planning concepts discussed in the program. He also highlights “Traps for the Unwary” in his presentations.

If you are interested in a longer program, some of the programs noted below can be combined. If there is a topic you are interested in which does not appear below, please let Jeff know and he may be able to develop it for you. If you would like a more detailed outline and description of any of the proposed programs, please let us know.

Distinctive Programs

The Humorous Side of Taxes. Jeff has created a 30 minute humorous Power Point slide show on the odd and funny side of taxes. He has been doing this program as an additional presentation for programs he has been speaking on. There is no additional charge. The presentation is normally done during or after a meal.

Speaking and Writing to Develop your Practice. Jeff Scroggin has spoken over 400 times at National, Regional and Local events. He has authored over 250 articles and columns and written for virtually every national estate planning publication in the country. In a 60-90 minute presentation, he provides insights on how to develop your reputation through speaking and writing, how to leverage your time most effectively and how to avoid time consuming mistakes.

Developing an Estate Planning Practice. Jeff Scroggin is a nationally recognized estate planning professional who has worked in estate planning as both an attorney and CPA. In an 2 hour discussion, he provides insights on why estate planning is such a growth business, how to develop an estate planning practice as an attorney, CPA or financial advisor and how to avoid time consuming mistakes.

Planning Jeopardy. Jeff Scroggin has developed a Power Point based program in which the audience decides the estate, tax and business planning topics that will be discussed among a Jeopardy-like choice of 25-30 topics. To be effective, this program takes at least 90 minutes. The same program can be done in a 45 minute game show format of interesting planning questions for a 3-4 contestants from the audience.

Tax, Insurance & Estate Planning Programs

TAX & ESTATE PLANNING IN 2014

Description: This program provides a comprehensive review of what happened to the tax code in 2014, the unique planning opportunities in 2014 and the traps that clients and their advisors should avoid. The program includes numerous planning examples and insights on tax, business and estate planning in this awkward environment.

Program Time: 60-180 Minutes

Level of Program: All Levels

PLANNERS' JEOPARDY

Description: This is an innovative program in which members of the audience choose what topics will be presented out of a Jeopardy-Like set of thirty different topics. The focus of the program is on practical tax and estate planning opportunities and traps after 2012. The program provides a unique and interesting way to present current planning issues and ideas, together with valued added materials. The handout includes over 330 slides.

Program Time: Minimum of 90 Minutes

Level of Program: All Levels

DOES INCOME TAX PLANNING TRUMP ESTATE TAX AVOIDANCE?

Description: Less than one-third of one percent of Americans will be subject to an estate tax. As a result, the tax planning component of estate planning will re-focus on income tax planning (e.g., spraying income to heirs in lower tax brackets) and planning for the basis of assets. This presentation will discuss the tax planning opportunities and the traps in the current tax environment.

Program Time: 60-120 Minutes

Level of Program: All Levels

TAX, BUSINESS AND ESTATE PLANNING IN A SLOW ECONOMY

Description: The impact of the recession may continue into 2014. With lower home prices and investment values, lack of credit for business purchases and a sharp reduction in interest rates, what are the tax, business and estate planning considerations that you clients should be examining? After a decade of an expanding economy, thinking in terms of lost values may be harder and, as a result, planning opportunities and tax traps may slip by. Jeff Scroggin will provide a practical discussion on planning ideas and traps in this chaotic environment.

Program Time: 90-180 Minutes

Level of Program: All Levels

THE CREATIVE USES OF DEFECTIVE TRUSTS

Description: The rules governing the estate and income taxation of trusts are NOT the same. As a result, creative planning opportunities exist for creating trusts which offer ways to meet client objectives while saving estate and/or income taxes. In recent years the IRS has issued new rulings that open new opportunities, such as using defective trusts to fix an out of date irrevocable insurance trust, using a defective trust to get around the trust rules on S corporations or using an income defective trust to effectively pay the income taxes of a trust. Jeff Scroggin has written and spoken extensively on this topic and will provide the audience practical planning ideas for using defective trusts.

Program Time: 60-120 Minutes

Level of Program: Moderate to Advanced

BABY BOOMER PLANNING – THE UNIQUE ISSUES

Description: Baby boomers are creating and facing a multitude of issues which they are ill prepared for. There are more divorces, more blended families, more single households, more unmarried couples than any previous generation. Boomers own businesses and homes in multiple states, raising unique state residency and tax issues. Jeff Scroggin will address the unique legal, tax and business issues facing boomers and provide practical ways that advisors can aid their clients in preparing for these problems.

Program Time: 60-120 Minutes

Level of Program: All Levels

USING REVOCABLE TRUSTS IN ESTATE PLANNING

Description: Revocable Trusts (sometimes called “Living Trusts”) can be a valuable part of a client’s estate planning. Unfortunately, advisors sometimes encourage clients who did not need such trusts to use them and have failed to encourage other clients to adopt such trusts as a part of their planning. Jeff Scroggin will provide insights into when and how Revocable trusts should be used and provide insights into the proper operation of such trusts.

Program Time: 60-90 Minutes

Level of Program: Beginning to Intermediate

20 TAX, INSURANCE & ESTATE PLANNING IDEAS YOU MAY NEVER HAVE HEARD ABOUT

Description: Mr. Scroggin draws on his thirty-three years as a tax, business and estate planning advisor to provide 20 practical planning ideas that you may never have heard about. The innovative planning ranges from how to properly structure a divorce settlement (e.g., pay attention to the basis in assets) to how to effectively use the transfer tax exemption of a less wealthy spouse.

Program Time: 90-120 Minutes

Level of Program: Intermediate

WHAT EVERY ESTATE PLAN SHOULD INCLUDE

Description: Estate planning is more than just having the right documents. This presentation discusses the practical aspects that should be a part of every estate plan. It talks about minimizing sources of family conflict, how to choose the right fiduciaries, and some of the simple mistakes that can ruin an estate plan.

Program Time: 45-60 Minutes

Level of Program: Basic to Intermediate

FAMILY LOVE LETTER™

Description: Several years ago, Jeff Scroggin recognized that something was missing in the planning he was providing to clients. Even when clients had the proper documents, mistakes and confusion was occurring because of lack of detailed information about the client’s desires, assets and personal situation. As a result Jeff developed the Family Lover Letter. Since its creation in 2000, over 400,000 Family Lover Letters have been distributed by various financial services companies (including AXA, Money & Neuberger Berman), attorneys and CPAs. Mr. Scroggin will discuss why there is a need for this important document and how to deepen your client relationships and grow your practice by effectively using it.

Program Time: 1 Hour to Half a Day

Level of Program: All Levels

NFLUENCING THE LEGACY™

Description: Every inheritance (or lack thereof) affects the recipient. Many clients are seeking methods to provide incentives and opportunities to families while reducing the risk that an inheritance will be squandered in an unearned, lavish lifestyle. They are increasing using creative ways to restrain heirs' access to the inheritance. Mr. Scroggin is a nationally recognized author and speaker on this topic and will provide an in-depth discussion of the methods clients are using to influence the legacy they are leaving behind.

Program Time: 60-120 Minutes

Level of Program: Intermediate to Advance

ESTATE PLANNING FOR THE TRANSIENT CLIENT: MULTI-STATE PLANNING

Description: Clients are constantly moving from state to state and country to country. National and State probate, trust, and tax laws vary significantly. Advisors need to be aware of the significant differences which can impact a client's estate and business plan and the techniques they can use to mitigate the negative effects.

Program Time: 60-120 Minutes

Level of Program: Intermediate

Audience: Both a US and an International Audience

SEVEN TRENDS IMPACTING TAX & ESTATE PLANNING

Description: The legal, tax and demographic trends impacting estate planning are fundamental and broad based, applying not just to the millionaires next door, but also to less wealthy clients. These ongoing trends will fundamentally transform how we plan. Jeff will lead a practical presentation of the source of the changes, and some of the new planning issues, marketing opportunities and traps in this fluid environment.

Program Time: 45-60 Minutes

Level of Program: Basic to Intermediate

INSURANCE PLANNING OPPORTUNITIES WHEN FEDERAL ESTATE TAXES DON'T MATTER

Description: For decades, estate planning has been largely dominated by desire to avoid and/or pay a federal estate tax. However, fewer Americans than any time in recent history will be subject to a federal estate tax. For the vast majority of Americans, estate planning will no longer be driven by the desire to avoid a confiscatory federal estate tax. Lower estate taxes would appear to reduce the opportunity to sell of life insurance. Mr. Scroggin will provide practical examples of where insurance is still a vital part to the planning process for a large portion of the public. He will provide innovative ideas designed to increase insurance sales.

Program Time: 60-120 Minutes

Level of Program: Intermediate

ESTATE PLANNING 101

Description: This program is designed to provide a basic estate planning understanding to a planner. Included in the program is a discussion of estate and income tax rules, wills, trusts, incapacity planning, planning for business owners, planning for retirement plans, minimizing family conflicts and how to handle life insurance.

Program Time: Half to Full Day

Level of Program: Basic

ESTATE PLANNING IS NOT ABOUT DEATH & TAXES IT IS ABOUT THE LEGACY YOU LEAVE BEHIND

Description: Is estate planning principally for the dead and the avoidance of their death taxes? How many dead people care about their taxes? Motivating people using the fear of something which will not affect them simply does not work. Instead of being for the dead, **ESTATE PLANNING SHOULD BE DESIGNED FOR THE LIVING!** Jeff Scroggin will talk use his humorous story telling approach to discuss the soft issues and how you can increase your impact on clients using practical approaches like The Family Love Letter, Ethical Wills and Family Mission Statements.

Program Time: 45-90 Minutes

Level of Program: All Levels

THE TOP FIFTEEN ESTATE AND TAX PLANNING TRAPS AND HOW TO SUCCESSFULLY AVOID THEM

Description: Jeff Scroggin draws on his thirty years as a CPA and Tax Attorney to highlight the top planning mistakes that attorneys and other advisors make in planning for clients. He will describe how to identify the mistakes, how to avoid them and what to do if your client has made the mistake.

Program Time: 90-180 minutes

Level of Program: Intermediate

REVIEWING ESTATE PLANNING DOCUMENTS A PRACTICAL APPROACH

Description: Financial advisors are constantly being provided copies of a client's pivotal planning documents, with the client expecting the planner to comment on any issues they observe in the documents. This program is designed to aid planners in what to look for when examining their client's key planning documents.

Program Time: 90-180 minutes

Level of Program: Intermediate

THE FUTURE OF ESTATE PLANNING – IT'S NOT DYING, IT'S JUST EVOLVING

Description: In this presentation, Jeff Scroggin will discuss the demographic, legal and tax changes that are radically changing how we approach estate planning and why estate planning will be a booming profession for the next 30 years. Included in the materials will be a 37 page handout providing 30 reasons on why estate planning and related work will explode in the next several decades and how the profession will change.

Program Time: 60-180 Minutes

Level of Program: Intermediate Level

ASSET PROTECTION

Description: Jeff Scroggin will provide a discussion of how clients should approach asset protection and provide specific practical planning ideas designed to protect client assets from the claims of divorce and litigation. He will provide the benefits of certain planning techniques and the traps for the unwary.

Program Time: 60-120 minutes

Level of Program: Intermediate

A TUTORIAL ON THE USE OF TRUSTS

Description: This program is designed to provide the audience insights into the various types of trusts available in estate planning, how and when each trust should be used and how such trusts can be created with flexible terms. The presentation also includes some of the traps that clients and their advisors should avoid.

Program Time: 90-240 minutes

Level of Program: Intermediate

PLANNING FOR THE TERMINALLY ILL

Description: This program is designed to provide attendees with insights of how to deal with the emotional, financial, tax and family conflict issues surrounding the impending death of a loved. It will provide checklists for the practitioner and practical advice on how to help a family prepare for the death of a loved one.

Program Time: 60-120 minutes

Level of Program: Intermediate

MINIMIZING FAMILY CONFLICTS IN ESTATE PLANNING

Description: The level of conflict among heirs has exploded in the past two decades. This presentation will focus the audience on the major sources of estate and trust conflicts and provide practical advice on how advisors can help clients minimize the conflicts, while still adequately protecting the interests of heirs.

Program Time: 60-120 minutes

Level of Program: Intermediate

BASIS PLANNING – THE FORGOTEN PART OF ESTATE PLANNING

Description: For decades the primary tax focus of estate planning has been in the minimization of transfer tax costs. Unfortunately, the basis issues of estate planning are often ignored to the peril of clients. In this discussion Jeff Scroggin will discuss some of the traps and opportunities in this relatively unexplored tax realm of estate planning.

Program Time: 60-120 minutes

Level of Program: Intermediate

TAX COMPLEXITY

Description: The Internal Revenue Code and Treasury Regulations encompass almost 4 million words. Its complexity continues to grow - with the rules becoming increasingly incomprehensible for both taxpayers and their advisors. This program discusses the sources of the complexity and provides numerous examples of unexpected results of the complicated code. The program includes a 27 page handout on the complexity, history and humor of federal and state tax laws.

Program Time: 45-60 minutes

Level of Program: Intermediate/Advanced

Business Planning Programs

LEGAL, TAX AND BUSINESS TRAPS FOR THE UNWARY BUSINESS OWNER

Description: The operation, purchase or transfer of any business carries a multitude of tax, legal, accounting and business traps for the unwary. Mr. Scroggin will provide a practical discussion of how operators, buyers and sellers of business can protect themselves from inadvertent liabilities and taxes. The program will provide practical business, legal and tax issues which any business owner should be aware of. The materials will include "value-added" materials designed to help grow the business advisory services of participants.

Program Time: 120-240 Minutes

Level of Program: Intermediate to Advanced

THE SEVEN INEVITABLE PROBLEMS IN A FAMILY BUSINESS AND HOW TO SUCCESSFULLY ERADICATE THEM

Description: There are **Seven Inevitable Problems** that can generate enormous conflicts and multiply taxes and costs in virtually every Family Business. Jeff Scroggin is a nationally recognized expert on this topic. He will discuss the source each problem and how to successfully eliminate their negative impact on your clients, their family and their business.

- I. DEATH & DISABILITY WILL OCCUR
- II. TAXES ARE INEVITABLE – BUT THEY MAY BE VOLUNTARY
- III. THERE IS NO EQUITY VALUE IN A FAMILY BUSINESS
- IV. THE INEVITABLE CONFLICT BETWEEN INSIDERS & OUTSIDERS
- V. PASSING ON THE PROBLEM
- VI. HEIRS INCREASE THEIR OWN BURDENS
- VII. FAMILY AND BUSINESSES DIVORCES WILL HAPPEN

Program Time: 60-120 Minutes

Level of Program: Intermediate

ARE YOU OR A CLIENT SELLING OR BUYING A BUSINESS? LEGAL, TAX AND BUSINESS TRAPS FOR THE UNWARY

Description: The purchase or transfer of any business carries a multitude of tax, legal, accounting and business traps for the unwary. Mr. Scroggin will provide a practical discussion of how buyers and sellers of business can protect themselves from inadvertent liabilities and taxes.

Program Time: 60-240 Minutes

Level of Program: Intermediate to Advanced

EFFECTIVELY TRANSFERRING A FAMILY BUSINESS WITHOUT LOSING YOUR SHIRT OR YOUR FAMILY

Description: Less than 15% of all family business survive to the third generation. Taxes, family conflicts, business mistakes and other errors limit the survival rate. However, with proper planning the odds can change in favor of the family. Jeff Scroggin will lead a discussion on how to transfer the family without losing your capital or destroying the family from the conflict which comes from poor planning.

Program Time: 60-240 Minutes

Level of Program: Intermediate to Advanced

UNDERSTANDING THE DIFFERENCES BETWEEN BASIC BUSINESS ENTITIES AND HOW TO MOST EFFECTIVELY USE THEM

Description: Sole Proprietorships, LLCs, FLPS, General Partnerships, LLPs, LLLPs, S Corporations, C Corporations, Professional Corporations, Personal Service Corporations, Affiliated Entities – the options available to you and your clients for their business can be mind boggling. Jeff Scroggin will provide a basic understanding of each of the types of entities, when they should be used and the tax and business traps which often accompany their creation.

Program Time: 120-240 Minutes

Level of Program: Basic to Intermediate

UNDERSTANDING OWNER AND BUY-SELL AGREEMENTS

Description: Virtually every business entity with more than one owner should have an agreement which clearly defines the rights and obligations between the parties, the events which trigger the purchase of owner's capital, the price for such a purchase and the post-closing obligations. Jeff Scroggin will lead a discussion on what these agreements should contain and how to avoid tax and business mistakes in the agreements.

Program Time: 60-240 Minutes

Level of Program: Intermediate to Advanced

EXIT PLANNING FOR CLOSELY HELD BUSINESSES

Description: In 2001 roughly 50,000 closely held businesses came up for sale and transfer. In 2014, the number was expected to exceed 900,000 – but there were no more buyers than there were in 2001. Closely held business owners have to find creative ways to transfer their businesses. Jeff Scroggin will lead a practical solutions oriented discussion of how business owners can most effectively sell their businesses to outsiders or insiders, transfer the business to family members or liquidate the business. He will provide insights on the traps for the unwary and how to reduce post-closing risks and taxes.

Program Time: 60-240 Minutes

Level of Program: Intermediate to Advanced

SPEAKER INFORMATION

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

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Mr. Scroggin has been married for 35 years to Lynn Geiger Scroggin and has three children. His oldest son is a professional blacksmith, his daughter works as a charitable event planner & fundraiser and his youngest son is an Iraq war veteran. Mr. Scroggin has practiced as a business, tax and estate planning attorney in Atlanta for 35 years. His practice is devoted to tax planning, estate planning, business representations, business succession and sales of businesses. He is co-creator of the "Family Incentive Trust" and creator of the "The Family Love Letter." He is known for his ability to convert complex, technical information into practical, useable forms. He also hopes he is not as pompous as this bio would seem to indicate.

Mr. Scroggin serves as a Member of the University of Florida College Of Law Board of Trustees. Mr. Scroggin received the following degrees from the University of Florida: B.S.B.A. (Accounting), 1974; Juris Doctorate, 1977; Master of Laws in Taxation (LL.M.), 1979. Mr. Scroggin has taught tax law at the University of Florida College of Law and College of Business. He was a CPA with Arthur Andersen's nationwide estate planning group. He is a Nationally Accredited Estate Planner, is rated "AV" by Martindale Hubbell (since 1990) and has been named in Atlanta magazine as a Georgia "Super-Lawyer" (2009 through 2014) and "Five Star Wealth Advisor" (2009, 2010, 2011, 2013). He holds a perfect 10 rating from AVVO. Mr. Scroggin was Founding Editor-in-Chief of the *NAEPC Journal of Estate and Tax Planning* from 2006-2011 and was Co-Editor of Commerce Clearing House's *Journal of Practical Estate Planning* from 2004-2006.

Mr. Scroggin's professional affiliations include: The State Bar of Georgia, the Florida Bar, American Revenues Society, American Tax Token Society, Atlanta Estate Planning Council, Buckhead Study Group, Georgia Planned Giving Council, and the North Georgia Estate Planning Council (President, 2002-2005). He was Chairman of the North Fulton Community Foundation from 2007-2009 and is a member of the Board of Directors of the National Association of Estate Planners and Councils (2002-2010) where he was Co-Chairman of the Long Range Planning Committee and served as Chairman of the Publications Committee. He is a member of the Board of Directors of the Historic Roswell Convention and Visitors Bureau (2004-present), and is a member of the Roswell Rotary Club. He served as Founding Chairman of the Friends of Barrington Hall (2008-2012). He practices out of an 1883 building in the historic district of Roswell. The building contains one of the largest collections of tax memorabilia in the country.

Mr. Scroggin is the author of over 240 published articles and columns. Among the publications are: *Estate Planning, Taxes, Financial and Estate Planning, Practical Tax Strategies, Leimberg Information Services, ABA Property and Probate, ABA Practical Tax Lawyer, ABA Practical Lawyer, AICPA Tax Advisor, Journal of Estates and Trusts, Trusts and Estates, Zaritsky's Estate Planning Alert, Journal of Financial Services Professionals, NAEPC Journal of Estate and Tax Planning, Journal of Financial Planning, Financial Services Professionals Newsletter, CCH Journal of Practical Estate Planning, Advisor Today, RIA Tax Watch, Financial Planning, Georgia Society of CPAs Bottom Line, Broker World, Life Association News, The Atlanta Journal/Constitution, Atlanta Business Chronicle, National Underwriter, Insights and Strategies, Bank Investment Marketing, NAILBA Magazine, Financial Services Advisor, Business Valuation, Utah Society of CPAs Journal, the Atlanta Bar Journal and the Georgia Bar Journal.. He has written three books and was recognized by the CFP Board of Examiners for writing one of the best planning articles for the year 2000. His website has been recommended by the Journal of Accountancy for estate planning purposes.*

Mr. Scroggin is a frequent speaker on business, tax and estate planning issues.. Among the groups he has spoken for are: The University of Florida Law School Graduate Tax Program (2004, 2008, 2009, 2010, 2012, 2013), the Georgia State University MBA Program, the Million Dollar Roundtable, the State Bar of Georgia ICLE (1992, 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2005, 2006, 2009, 2013), The National Convention of the Financial Planning Association (1997, 1998, 2003, 2004, 2005, 2006, 2007, 2008 & 2011), the Atlanta Bar Association, Georgia Society of CPAs Annual Estate Planning Conference (2007, 2010, 2011, 2012), the Georgia Federal Tax Conference (2012, 2013), The Texas Society of CPAs, Georgia Planned Giving Council, the Columbus Ohio Community Foundation, the Dallas Foundation, the Naples Community Foundation, the Philadelphia Estate Planning Council (2007, 2010), the Estate Planning Council of Mississippi (2000 & 2003), the Central Texas Estate Planning Council, the Wilmington Estate Planning Council, the Spokane Estate Planning Council, the Stuart Estate Planning Council, the Northern Arkansas Estate Planning Council (2007, 2008), the St. Louis Estate Planning Council, the Louisville Estate Planning Council, the Atlanta Estate Planning Council, the Estate Planning Council of North Georgia, Chattanooga Estate Planning Council (2012, 2013), the Northern Michigan Estate Planning Council, Estate Planning Council of Winston Salem, the Detroit Estate Planning Council, Red River Estate Planning Council, North Alabama Estate Planning Council, the Wisconsin FPA, the College for Financial Planning, The Society of Financial Services Professionals National Convention, The National Business Institute, NAPFA National Convention, The National Convention of the U.S./Philippine Chamber of Commerce, The Annual Convention of the Southern Council of Optometrists, The International Forum (2009, 2010) the Society of Senior Risk Managers, Ascensus, Financial Service Corporation, NAIFA Annual Meeting, Producers Web, First Global, Subcenters, North Carolina Society of CPAs, North Carolina SFSP Annual Meeting, AXA Advisors, The Milner Group, ChFC Georgia Chapter, IAFP Georgia Chapter, NAIFA Georgia Chapter, Mid-South Society of the Institute of Certified Financial Planners, First Colony Life Insurance, CUNA Mutual Group, MetLife, Prudential Insurance Company, Family Wealth Counselors National Convention, Willis Corroon, Guardian Life Insurance Company (2011, 2012), American General Life Insurance, Financial Network Investment Corp, Gulf States FPA (2007, 2010), Tri-State FPA Annual Meeting, the Houston FPA, NAILBA Annual Meeting, Atlanta Life Underwriters EXPO, A.G. Edwards, Enterprise Group of Funds, and the Annual Convention of National Beer Wholesalers Association (2003, 2005, 2006, 2007, 2008 & 2009).

Mr. Scroggin has been quoted in a number of media sources, including: the Wall Street Journal (1999, 2004, 2005, 2006, 2007, 2009, 2010), CNN Headline News (on the Terri Schavio case), the New York Times (2005, 2013), (MSN Lifestyle, the Atlanta Journal/Constitution, National Public Radio Marketplace Radio, National Public Radio Talk of the Town, Fortune Magazine, Money Harvest, Dow Jones Investment Advisor, Worth Magazine, Registered Representative Magazine, Leads Magazine, Image Magazine, Financial Advisor, The Practical Accountant, National Underwriter, Bloomberg Wealth Management, Life Association News, Financial Planning, The New York Times, The Asian Wall Street Journal, New York Times International Herald Tribune, Planner Pavilion.com, Journal of Financial Services Professionals, Houston Chronicle, Fort Worth Star Telegram, Forbes Magazine (1999, 2001, 2012), Redbook, Kiplinger's, Money Magazine, Austin American-Statesman, Medical Economics, Smart Money Magazine, Wall Street Magazine, Minneapolis St Paul Business Journal, Investment News, The South China Post, Secured Retirement, The LA Times, Advisor Today, Bank of America magazine, Fortune Investor, BNA Estates Gifts & Trusts Journal, Atlanta Business Chronicle, Newsday, Chicago Sun-Times, Bankrate.com, ABA Probate & Property, the Clarion Ledger, the Miami Herald, MSNBC (2010), CNBC (2013), New England Financial Journal, the Baltimore Business Journal, and Knight-Ridder Tribune.