

# 2016 National Conference on Special Needs Trusts and Special Needs Planning • Oct. 19–21, 2016

## Can't Attend the Conference? Non-Attendee Materials Order Form

Mr. Ms. Dr. \_\_\_\_\_  
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### Pre-Conferences • October 19, 2016

**Tax Intensive** | Full-day program with breakouts that focus on tax issues in special needs planning.

**Pooled Trusts Intensive** | Full-day intensive program with breakouts that focus on issues for pooled trusts administrators, attorneys and others who work with pooled trusts.

### National Conference • October 20–21, 2016

This year, the National Conference has a new format. The conference will start on Thursday morning with general sessions for everyone—regardless of experience level. The afternoon sessions will feature three tracks: basics, administration and advanced. Friday morning sessions are for all experience levels, and will include a presentation by Kenneth Brown from the Social Security Administration (via video conference). Lunch will feature keynote speaker Charlie Weis, a noted football coach who served as head coach for the Kansas Jayhawks, Notre Dame Fighting Irish, as well as an offensive coordinator for several NFL teams. Friday afternoon we will host breakout sessions, and conclude with a general session—*The Update* by Robert B. Fleming.

### Purchase Additional Materials

Check your preferred option. Prices below.

- Flash Drive       Binder
- Tax Intensive . . . . . \$100
- Pooled Trusts Intensive . . . . . \$100
- National Conference . . . . . \$250
- All three (3) programs . . . . . \$350

Prices do not include 7% sales tax. Materials will be received at conference. Webcaster materials will be mailed 3-6 weeks post-conference.

### Audio Download

- Tax Intensive . . . . . \$100
- Pooled Trusts Intensive . . . . . \$100
- National Conference . . . . . \$500
- All three (3) programs . . . . . \$625

Download will be available 3-6 weeks post-conference.

### Audio CDs

- Tax Intensive . . . . . \$125
- Pooled Trust Intensive . . . . . \$125
- National Conference . . . . . \$500
- All three (3) programs . . . . . \$650

Prices do not include 7% sales tax and \$9 shipping fee. Audio CD will be mailed 3-6 weeks post-conference.

### Materials Order

Materials Total: \_\_\_\_\_

7% Tax: \_\_\_\_\_

Shipping Fee (Binders and Audio CDs): \$9.00

Shipping Fee (Flash Drive): \$4.00

**Total Enclosed:** \_\_\_\_\_

### Payment Information

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- VISA       MC       AMEX

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