WealthCounsel®
Leading Provider of Tools & Intelligence
to the Estate Planning Community

SPEAKERS BUREAU

What is it?

The goal of the WealthCounsel Speakers Bureau is to better educate allied professionals and other members of the public about the estate planning profession, while giving WealthCounsel members and those practitioners who participate in this service the opportunity to appear before professional and civic groups to further enhance their credentials and reputation in the industry.

How does the process work?

1. A request for a speaker is typically generated through the WealthCounsel Speakers Bureau website page.

2. The request is reviewed by our staff and a query is sent to members of the Speakers Bureau and to other WealthCounsel attorneys. Those members interested in pursuing the speaking engagement are asked to respond by email to marketing@wealthcounsel.com

3. The marketing staff compiles a list of the members who responded to the query and forwards the information to the requesting organization. At this point, the WealthCounsel staff steps out of the process and the requesting organization communicates directly with the speakers.

4. At this point, WealthCounsel staff steps out of the process, and arrangements such as travel expenses are finalized between the requesting organization and the speaker-elect.

What's the Next Step If My Organization Wants to Use the WealthCounsel Speakers Bureau?

1. Complete the attached Speaker Request Form.

2. Fax the form to the attention of Marlene Frith, 888-292-6126.

3. Or, email marlene.frith@wealthcounsel.com, requesting that an application form be emailed to you.

4. For additional information, call 888-659-4069, Ext. 817.

WealthCounsel Speakers Bureau

WealthCounsel Speakers Bureau Application

Please Complete This Form and FAX Back to: 888-292-6126

Name: ____

Organization: ____

Address: ____

Contact Number: __________________ **FAX**_______________

e-mail: ____

Our organization would like a speaker for the following:

If you do not see a topic on the list below, please indicate the topic and and we will initiate a query for a speaker on that topic.

First Choice for Topic:________________________ Second Choice for Topic: _____________________ Location of Event: ___________________________ Profile of the Audience: ________________________ Number of Attendees in Audience: ______________ Will this presentation involve CE credits: _________ Who will file for CE credit? _____________________ Additional comments or instructions:	• Asset Protection Trusts • LLC Planning • Irrevocable Trusts • Revocable Living Trusts • IRA Trust Planning • Retirement Planning • Charitable Planning • Trust Administration • Trust Owned Life Insurance • Domestic and Offshore Trusts • FLPs & FLLCs • Elder Law Planning • Special Needs • Medicaid Planning • Planning for Physicians • Business Succession Planning • Income and Estate Tax Issues • Pet Trusts • Marketing Your Practice