Introduction/Overview:

WealthCounsel's responsibility as industry leaders reaches beyond our role as providers of practice solutions, to the impact our industry has on society as a whole. This sense of corporate responsibility has motivated WealthCounsel to promote the importance of proper estate planning and to increase public awareness of the consequences of failing to plan for one's loved ones. To this end, we have created a public relations campaign involving a YouTube video contest that engages WealthCounsel attorneys who are helping to create hundreds of family legacies across the country each day.

In conjunction with WealthCounsel's strategic relationship with the National Association of Estate Planners & Councils (NAEPC) and in support of our organizations' mutual goal to heighten awareness of National Estate Planning Awareness Week (October 17-21, 2011), WealthCounsel will officially launch this campaign on Monday, October 10, one week prior to National Estate Planning Awareness Week.

"*Creating Lasting Legacies: How WealthCounsel Attorneys Make a Difference*" is a video contest of client success stories submitted by WealthCounsel attorneys and then voted on by their peers and the public.

Each month, beginning in late October 2011 and extending through May 2012, only three (3) videos will be accepted on a first-come-first-served basis. These videos will be showcased on a special web page on the WealthCounsel website.

In June 2012, online voting of these videos will open. The top three winners will be announced at the Planning for the Generations Symposium in July 2012 at the Hyatt Regency Hotel in Denver, CO. Cash prizes will be given to the first, second and third place winners.

General Guidelines for Participation:

Videos will be reviewed by WealthCounsel staff to ensure compliance with the requirements stated below. By participating in this contest, you agree to the following terms.

- WealthCounsel is granted permission to process the raw footage from the video file you provide into a YouTube video format. You will be given an opportunity to review the final version of the processed video prior to it going live.

- WealthCounsel is granted permission to use the video for marketing and advertising purposes, including posting on the WealthCounsel website, promotions in email communications and printed materials, links to the video from press releases distributed to the public at large, through social media platforms, and any other marketing channels that are deemed appropriate.

- If your video is accepted, it will be utilized throughout the length of the contest and may be utilized within the execution of this contest as well as in channels unrelated to the contest campaign.

- You must be a WealthCounsel member and only one video per member firm will be accepted.

- Submission of a blog article to enhance your success story is highly encouraged. Please submit a blog article summarizing your story. This blog article will be posted on The Estate Planning Blog site along with your video to increase awareness. For editorial guidelines on writing your blog please refer to our blog site submission guidelines. Please submit a blog article and your headshot photograph electronically via email to lori.berry@wealthcounsel.com.

Cash Prizes:

Prize values are awarded to the top-three vote getters.

- First Prize: $1,000 Cash Prize
- Second Prize: $750 Cash Prize
- Third Prize: $500 Cash Prize

Presentation Format:

The details of the case study should be vague enough to protect client confidentiality. If details are too specific and there is a chance that your client might recognize they are the subject of your case study, you may want to obtain the client's permission. If you are unsure about your state bar rules, please check with your Bar before submitting a video.

Look into the camera and tell your client's story from your heart. For best results, do not read from a script, but do rehearse the story before recording. Explain how WealthCounsel's tools and resources helped provide you with the expertise to handle the situation.

Narrate your story in case study format:

- **Background:** State the family or business dynamics.
- **Challenge**: Specify any unusual challenges to be addressed.
- **Solution:** Describe the planning strategies or documents used to implement the proper planning.
- **Outcome:** Explain how the estate plan successfully executed the client's legacy and "**if not but for**" your expertise, the outcome could have been very different.

Video Specifications:

Videos can be captured with the use of any video recording device such as a computer camera, web camera or camcorder. Videos must meet format and submission guidelines as indicated below. Any videos not meeting these guidelines will not be accepted.

- Video length should be five minutes or less.
- Video files must be submitted in .wmv or mp4.
- The aspect ratio of the video has to be between 9x16 and 16x9.
- The video size must be one gigabyte (GB) or less.

How to Submit Your File:

There are multiple methods available for you to submit your video file. You may submit your video file electronically via an FTP site or YouSendIt.com. Or you may burn your file to a DVD and ship it to us.

- FTP Site
  - Upload your video file to your FTP site.
  - Email access and download instructions to prem.adams@wealthcounsel.com.

- YouSendIt.com
  - Upload your video file to YouSendIt.com
  - Share/Send to prem.adams@wealthcounsel.com.

- DVD
  - Copy your video file to a DVD disc.
  - Place DVD in a protective case.
  - Ship in a padded envelope to WealthCounsel Lasting Legacies, 2110 Luann Lane, Madison, WI 53713.

In the event that additional videos are required to meet our three-per-month quota, WealthCounsel staff will film videos onsite at upcoming forum meetings and education events. Below is a list of upcoming dates and locations where these back-up videos may be filmed*.

- October 20, 2011: Sacramento Convention Center, 1400 J Street, Sacramento, CA 95814
- October 28, 2011: Radisson Hotel, 4545 MacArthur Boulevard, Newport Beach, CA 92660
- November 3-4, 2011: SpringHill Suites O'Hare, 8101 Higgins Road, Chicago, IL 60631
- November 9-11, 2011: Hilton San Diego, 1960 Harbor Island Drive, San Diego, CA 92101

** Dates, locations and availability of staff and/or equipment are subject to change. Contact Lori Berry at lori.berry@wealthcounsel.com for more information.*

Participation Deadlines:

Each month in accordance with the schedule outlined below, a “Call for Videos” will be distributed to all WealthCounsel members via email. To secure your participation, you must respond immediately to the call [or no later than the fifth (5th) of the month], by sending an email to lori.berry@wealthcounsel.com. All video reservations will be processed on a first-come-first-served basis. With your email request, include an abstract summary of the client success story to be recorded and submitted. Also include your full name, address, email address, phone number and web address. Once Lori Berry has confirmed your video reservation request, your video file must be received by WealthCounsel by the 20th of that same month.

Please see the example below for clarification of the submission process:

> **EXAMPLE**:
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> When the "Call for Videos" goes out on **November 28, 2011**, your reservation request must be among the first three emails received and that email must arrive by **December 5, 2011**. If your response to the "Call" was among the first three received, you will receive a confirmation email from Lori Berry that you may proceed to film your video story. Your video file must arrive at WealthCounsel by **December 20, 2011**.

Again, only three (3) videos will be showcased per month on a first-come-first-served basis.

Videos recorded on site at WealthCounsel education events will be added to a back-up queue in the event that video requests are not delivered. These will be added to the back-up queue based on the date they are recorded.

Video submissions will be accepted beginning in October 2011 and end in May 2012. If you will be recording your own video story and submitting to WealthCounsel, please refer to the following deadlines:

October 31, 2011:	Call for Video submissions
November 5, 2011:	Video participation request, abstract and your contact information due via email
November 20, 2011:	Video file due to WealthCounsel via electronic file or DVD shipment
December 2011:	Your video is showcased
November 28, 2011:	Call for Video submissions
December 5, 2011:	Video participation request, abstract and your contact information due via email
December 20, 2011:	Video file due to WealthCounsel via electronic file or DVD shipment
January 2012:	Your video is showcased
December 26, 2011:	Call for Video submissions
January 5, 2012:	Video participation request, abstract and your contact information due via email
January 20, 2012:	Video file due to WealthCounsel via electronic file or DVD shipment
February 2012:	Your video is showcased
January 30, 2012:	Call for Video submissions
February 5, 2012:	Video participation request, abstract and your contact information due via email
February 20, 2012:	Video file due to WealthCounsel via electronic file or DVD shipment
March 2012:	Your video is showcased

February 27, 2012:	Call for Video submissions
March 5, 2012:	Video participation request, abstract and your contact information due via email
March 20, 2012:	Video file due to WealthCounsel via electronic file or DVD shipment
April 2012:	Your video is showcased
March 26, 2012:	Call for Video submissions
April 5, 2012:	Video participation request, abstract and your contact information due via email
April 20, 2012:	Video file due to WealthCounsel via electronic file or DVD shipment
May 2012:	Your video is showcased
April 23, 2012:	Call for Video submissions
May 5, 2012:	Video participation request, abstract and your contact information due via email
May 20, 2012:	Video file due to WealthCounsel via electronic file or DVD shipment
June 2012:	Your video is showcased
June 1-30, 2012:	Voting on videos is conducted throughout the month of June.
July 9, 2012:	Winners are notified by Lori Berry
July 17, 2012:	Winners of the video contest are publically acknowledged on opening day at the Planning for the Generations Symposium in Denver, CO.

Questions:

Contact Lori Berry of WealthCounsel at 888-6549-4069, Ext. 822, or Email Lori at lori.berry@wealthcounsel.com.