



## STATE FORUM SPEAKERS BUREAU

### **Mission**

The WealthCounsel State Forum Speakers Bureau exists to provide state forums with expert speakers and topics for the purpose of providing quality, symposium level education at local state forum meetings.

### **Promoting the State Forum Speakers Bureau**

WealthCounsel's State Forum Speakers Bureau is listed on the newly designed state forum website where state forum leaders throughout the country will select speakers and topics for their conferences and forum meetings. WealthCounsel will promote our State Forum Speakers Bureau as the primary source to which forum leaders select expert speakers on topics relevant to their members' practices.

### **Qualifications for the State Forum Speakers Bureau**

- Current WealthCounsel member for at least one year
- At least five years experience in the estate planning profession
- A member in good standing of your state bar association
- At least 3 previous speaking engagements to an audience of professionals on the topic of expertise (Note: Seminars to clients/consumers do not qualify for this criterion)
- Agreement to speak at an agreed upon rate of \$1,200.00 which includes cost of travel, meals, and all other speaker expenses

### **The Process: Matching a Speaker with a Requesting State Forum**

Individual state forum leaders will use the WealthCounsel state forum website to create upcoming forum events. As a part of the event creation, the leaders will select specific speakers and topics from the State Forum Speakers Bureau. When a speaker and topic is requested through the website, the speaker will receive an automated e-mail requesting a speaking engagement. The speaking engagement request will include the name of the state forum, the date and location of the event, and the presentation requested. Individual speakers will then be instructed to respond directly to the state forum leadership as to their availability and willingness to speak. Once the state forum has held its meeting, the speaker will receive payment directly from WealthCounsel. Members who meet the above qualification criteria may complete and submit the accompanying application form.

**STATE FORUM SPEAKERS BUREAU  
SPEAKER APPLICATION**

**Name:** \_\_\_\_\_

**Firm:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City / State / Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **FAX** \_\_\_\_\_ **e-mail:** \_\_\_\_\_

Please indicate the three previous speaking engagements needed to qualify for the State Forum Speakers Bureau:

**Program #1:** \_\_\_\_\_  
Duration: \_\_\_\_\_ (hrs.)  
Audience Type: \_\_\_\_\_

**Program #2:** \_\_\_\_\_  
Duration: \_\_\_\_\_ (hrs.)  
Audience Type: \_\_\_\_\_

**Program #3:** \_\_\_\_\_  
Duration: \_\_\_\_\_ (hrs.)  
Audience Type: \_\_\_\_\_

Once you are approved as a speaker, you will be given access to the State Forum Website and will be able to complete a speakers profile outlining the topics and presentations you are offering to present. This is to certify that I meet the stated qualifications, and am hereby requesting to be placed on the WealthCounsel State Forum Speakers Bureau.

**Signature:** \_\_\_\_\_ **WealthCounsel Member Since:** \_\_\_\_\_  
(mo/yr)

Return completed application to:

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