

Thank you for your participation in the webcast *Most Compelling Opportunities Now: Making Two Years Last a Lifetime* on November 15, 2011, 1:00 – 2:00 p.m. ET. Please see below for Continuing Education information.

CPE: This course is approved for **1.0 CPE** credit through NASBA. If you are a CPA, please self-report to your state board of accountancy.

CFP: This course is approved for **1.0 CFP** credit (Course ID: “Compelling”) through the national CFP Board. If you are an active CFP, please complete the Excel spreadsheet for this webcast and email to cle@wealthcounsel.com.

CLE:

| State | Course Title | Course # | Date | Total | Ethics |
|-------|---|-----------------------------|----------|-----------------------------|--------|
| AR | Most Compelling Opportunities Now: Making Two Years Last a Lifetime | Provider #P034 | 11/15/11 | 1.0 | 0 |
| CA | Most Compelling Opportunities Now: | Provider #13853 | 11/15/11 | 1.0 | 0 |
| CO | Most Compelling Opportunities Now: | "Two Years Last a Lifetime" | 11/15/11 | 1.0 | 0 |
| FL | Most Compelling Opportunities Now: ... | 28022 | 11/15/11 | 1.0 CLER, 1.0 Cert. (Wills) | 0 |
| GA | Most Compelling Opportunities Now: | 156822 | 11/15/11 | 1.0 | 0 |
| IL | Most Compelling Opportunities Now: | approved | 11/15/11 | 1.0 | 0 |
| KY | Most Compelling Opportunities Now: | 125452 | 11/15/11 | 1.0 | 0 |
| MN | Most Compelling Opportunities Now: | 161791 | 11/15/11 | 1.0 | 0 |
| MO | Most Compelling Opportunities Now: | Approved | 11/15/11 | 1.2 | 0 |
| NY | Most Compelling Opportunities Now: | Recognizes CA approval | 11/15/11 | 1.0 | 0 |
| OK | Most Compelling Opportunities Now: | approved | 11/15/11 | 1.0 | 0 |
| TN | Most Compelling Opportunities Now: | 113500 | 11/15/11 | 1.0 | 0 |
| TX | Most Compelling Opportunities Now: | 901234269 | 11/15/11 | 1.0 | 0 |
| UT | Most Compelling Opportunities Now: | pending | 11/15/11 | 1.0 | 0 |
| WA | Most Compelling Opportunities Now: | 296236 | 11/15/11 | 1.0 | 0 |

California, New York, there is no need to report your credits. You must keep track of your own credits in case of audit. CA is on New York's list of approved jurisdictions. **New York** requires that you have the **Attendance Verification Code** (was visible online during the webinar)

Kentucky (please complete Form 3 and send to us), Oklahoma, Tennessee, Washington, we will report your credits for you (please make sure that we have your bar number)

Arkansas, Colorado, Florida, Georgia, Illinois, Minnesota, Missouri, Texas, Utah, please self-report your credits.

*If your state is **not** mentioned above for **CLE**, you will need to file for credit by completing the enclosed form and mailing it to your State's **MCLE** office.* For your convenience, we have created the attached kit for your use. The kit includes:

1. Uniform Certificate of Attendance (**This will be emailed to you after the webcast.**)
2. Uniform Application for CLE
3. Timed Agenda
4. List of MCLE Administrators by State

Instructions:

1. If your state does not have pre-approval listed in the table above, complete the **Uniform Application for CLE** with your state and personal information.
2. Sign the **Uniform Certificate of Attendance** and fill in the Attendance Verification Code (for New York and any other states requiring additional proof of attendance)
3. Include any attachments listed on the Uniform Application for CLE, as required by your state.
4. Send the packet to the MCLE administrator for the state(s) in which you seek credit (see **List of MCLE Administrators by State**).

We appreciate your commitment to our education programs!

Monica Comfort
888-659-4069 x823
monica.comfort@wealthcounsel.com
monica.comfort@advisorsforum.com

UNIFORM CERTIFICATE OF ATTENDANCE

Sponsor: WealthCounsel, LLC
Activity Title: Most Compelling Opportunities Now: Making Two Years Last a Lifetime
Date: 11/15/2011
Location: Internet
Activity Number: California Provider #13853 (Estate Planning -Legal Specialization); Arkansas Provider #P034; FL Course #28022; GA Course #156822; KY Course #125452; MN Course #161791; TX #901234269 (Estate Planning Legal Specialization); TN Course #113500; WA Course #296236; WealthCounsel Advisors Forum CFP Sponsor ID 3577 Course ID "CharitablePlanning"

This program has been approved for a total of

- 1.0 CLE credit hour based on 60-minute hours
- 1.0 CLE credit hour based on 50-minute hours
- 1.0 CPE credit hour (NASBA Provider 108255 and Texas Board of Public Accountancy Provider 9610)
- 1.0 CFP credit hour (CFP Board; Sponsor ID 3577)

Attendance Verification Code (for NY and other states requiring additional proof of attendance): _____

Reminder: Introductory remarks, keynote addresses, business meeting, breaks, receptions, etc. are not included in the computation of credit.

Submitting a false or fraudulent Certificate of Completion to the Insurance Commissioner may subject any license application to denial, and any issued license to suspension or revocation.

Attendance records will be maintained by Provider for at least 5 years.

To Be Completed By Attorney

By signing below, I certify that I attended the activity described above and am entitled to claim _____ CLE credit hours, including _____ Ethics credits.

Attorney Name (Print)

Signature

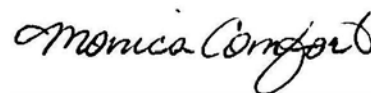
Membership, Registration
or Supreme Court Number

Date

Note: If you are required to report to more than one state, complete a form for each state.

State where credits are to be registered

Acknowledged by:



Sponsor Representative

Sample Letter

To be placed on your letterhead and mailed to the MCLE Administrator for the state in which you seek credit. Please include your Uniform Certificate of Attendance when you mail this letter.

Dear (*Name of MCLE Administrator*):

I attended WealthCounsel, LLC's ***Most Compelling Opportunities Now: Making Two Years Last a Lifetime*** on November 15, 2011, 1:00 – 2:00pm ET. This course has been approved for MCLE credit in the following states:

| State | Course Title | Course # | Total | Ethics |
|-------|---|-----------------------------|--------------------------------|--------|
| AR | Most Compelling Opportunities Now: Making Two Years Last a Lifetime | Provider #P034 | 1.0 | 0 |
| CA | Most Compelling Opportunities Now: | Provider #13853 | 1.0 | 0 |
| CO | Most Compelling Opportunities Now: | "Two Years Last a Lifetime" | 1.0 | 0 |
| FL | Most Compelling Opportunities Now: ... | 28022 | 1.0 CLER, 1.0 Cert. (Wills) | 0 |
| GA | Most Compelling Opportunities Now: | 156822 | 1.0 | 0 |
| IL | Most Compelling Opportunities Now: | approved | 1.0 | 0 |
| KY | Most Compelling Opportunities Now: | 125452 | 1.0 | 0 |
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| TN | Most Compelling Opportunities Now: | 113500 | 1.0 | 0 |
| TX | Most Compelling Opportunities Now: | 901234269 | 1.0 | 0 |
| UT | Most Compelling Opportunities Now: | pending | 1.0 | 0 |
| WA | Most Compelling Opportunities Now: | 296236 | 1.0 | 0 |

I am requesting accreditation approval for (*state*). My State Bar membership number is (*list number*).

Please let me know if you need additional information.

Sincerely,

(*your name*)

UNIFORM APPLICATION FOR ACCREDITATION OF CONTINUING LEGAL EDUCATION

To the state of: _____

1. Sponsoring organization:

Name: WealthCounsel, LLC
Address: 1615 N 202nd Pl, Shoreline, WA 98133
Telephone: (888) 659-4069 Fax (800) 419-3603
E-mail: monica.comfort@wealthcounsel.com

2. Title of educational activity:

Most Compelling Opportunities Now: Making Two Years Last a Lifetime

3. Date(s) and location(s): 11/15/11 Live, interactive webcast

4. Registration fee: \$0

5. Writing surface available? Yes No

6. Delivery Method(s): faculty in room with participants; telephone to broadcast site; interactive video; satellite; audiotape presentation; videotape presentation; Interactive computer/internet discussion leader present

7. Type of Law code(s): 1. WIL 2. _____ (Optional) 3. _____ (Optional)
Difficulty Level: Beginner; Intermediate; Advanced

8. Advertised to: Lawyers; Clients; Others (specify, list %): _____

9. List any admission restrictions: none

10. "In-house activity" requirement (see local rules to determine applicability):
 open/publicized to outside lawyers; outsiders are _____ % of faculty; clients are _____ % of audience

11. Method of evaluation: participant critique; independent evaluator; none
 other _____

12. Description of materials to be distributed: total pages 40 looseleaf; bound
Distributed: Before Program; At program; Other: electronic

13. REQUIRED ATTACHMENTS to this application:
a. time schedule (brochure, course outline, course description)
b. table of contents or equivalent
c. faculty name(s) and credentials (if not in brochure or description)
d. complete set of materials (only in states where required)
e. fees (only in states where required)

14. Total minutes of instruction, not including breaks, meals or introductions:
General (non-ethics): 60
Ethics (minutes): 0
Total: 60
Other: _____

15. Approval by other states: Granted by AR,CA,CO,FL,GA,MO,NY,OK,TN,TX,UT,WA; Pending IL,MN,UT
Denied by _____

16. Submitted by: employee of sponsor/provider; individual lawyer

SPONSOR OBLIGATIONS: Sponsor acknowledges and agrees to comply with all local rules and regulations attached.

Sponsor Representative Monica Comfort
Title Education Administrator
Signature /s/ Monica Comfort
Date 11 / 15 / 2011

Attorney Name _____
State Bar Number _____
Address _____
Telephone (____) _____
E-mail _____
Signature _____
Date ____ / ____ / ____

**STATE ACCREDITATION OFFICE
NOTICE OF DECISION**
Course No. _____

(To be completed by the state accreditation office and returned to applicant)

The following action has been taken on this application:

RETURNED for more information.
Please complete each item on the form indicated by the number(s) circled below:
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16

APPROVED for _____ CLE credits, Including _____ Ethics credits

DENIED Reference _____ SEE ATTACHED MATERIALS.

Date: ____/____/____ MCLE Staff _____

Most Compelling Opportunities Now: Making Two Years Last a Lifetime

November 15, 2011, 1:00 PM

Presented by Paul S. Lee, JD, LLM and Carl R. Waldman, JD

1:00-1:10 Introduction of topic: With the enactment of new estate, gift tax and GST tax (but possibly temporary) laws, how should professionals plan for their clients over the next two years?

1:10-1:25 State of the estate tax currently and the likely state of the transfer tax system in 2013 and beyond.

1:25-1:35 The most compelling estate planning techniques based upon the current state of the capital markets, such as Back-loaded, “Shark-Fin,” and “Intentionally Defective” CLATs

1:35-1:50 The two techniques that solve the biggest risk that exists for estate planning clients today. And learn which strategies to act on that might go away in 2013.

1:50-2:00 Q&A with instructor