

# Leimberg Services

## Spotlight On Benefits



What others  
are saying  
about the value  
of LISI to their  
practice



Council Tools  
Provided by NAEPC

## Law



*“LISI stands out as the state of the art in the estate planning industry. The articles are both timely and of the highest quality. When anything important occurs, I know that I will receive notification of it, as well as a skilled analysis promptly. If an advisor is not a subscriber to LISI, the quality of his/her advice certainly suffers. I believe that all technically proficient advisors subscribe, but I suspect that many others are simply not aware of what they are missing and the potential harm to their clients that will (not “may”) occur.”*

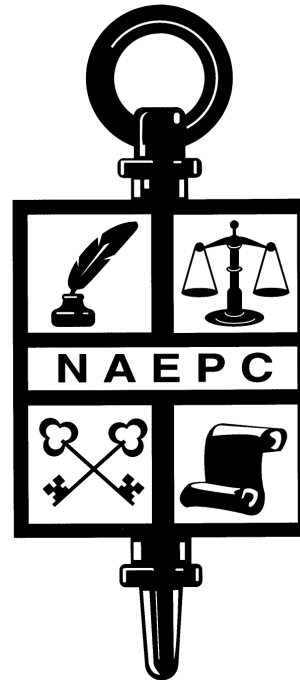
Richard A. Oshins, JD, LL.M., MBA,  
AEP® (Distinguished)

*“Leimberg Information Services is an invaluable resource. It alerts me to important cases and developments in a timely fashion, with excellent commentary by the best in our industry. The website is a treasure trove of information that I cannot do without in my practice.”*

David A. Handler, JD,  
AEP® (Distinguished)

*“LISI is an essential tool for every estate planning practice. LISI provides timely insights and creative planning ideas from leading attorneys, CPAs, financial advisers, and insurance consultants. When researching a planning issue not infrequently you’ll find an article right on point in LISI. LISI is indispensable.”*

Martin M. Shenkman, CPA, PFS, MBA,  
JD, AEP® (Distinguished)



## NAEPC COUNCIL SERVICES

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# How can Leimberg Services help your practice?

## Accounting



*"LISI changed everything by focusing on the world of financial and estate planning. I used to read hundreds of pages a week searching for the jewels my clients need. Today LISI fills that gap".*

Robert S. Keebler, CPA/PFS, MST,  
AEP® (Distinguished), CGMA

*"Steve Leimberg has been a pioneer in the field of estate and financial planning. Not only has he been a leader in technology, also his LISI service has been one of the most creative estate planning products on the market. Steve has the rare ability of taking the most complex of planning areas and making them understandable to the average person."*

Sidney Kess, CPA, JD, LL.M.,  
AEP® (Distinguished)

### STAY CONNECTED



Watch for weekly  
email updates from  
[LISUpdate@naepc.org](mailto:LISUpdate@naepc.org)

## Financial and Insurance Planning



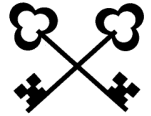
*"LISI represents the one best resource to answer questions that arise in my practice about insurance, legal, and/or accounting issues. Every local estate planning council member should take advantage of the opportunity offered through NAEPC to subscribe to this valuable service at such a significant discount."*

Clark B. McCleary, CLU®, ChFC®,  
AEP® (Distinguished)

*"If advisors want to stay on top of current issues and thoughts, they need to be subscribers of Leimberg Information Services(LISI). There is nothing available, that I know of, that is more current than the LISI material."*

Michael W. Halloran, CFP®, ChFC®,  
CLU®, AEP® (Distinguished) Nominee

## Trust Services



*"Leimberg Information Services is the BEST way to keep current on developments that are essential to estate planning practices. I regularly find out about developments on LISI before I hear about them from other sources. The summaries of developments always include practical analyses of how the developments impact practical estate planning issues and client needs. LISI is a must-have resource for estate planning professionals."*

Steve R. Akers, JD, AEP® (Distinguished)

*"LISI is the most powerful resource in the industry to stay updated in order to maintain a technical, marketing and sales advantage when dealing with clients and their advisors. Knowledge sells, and LISI provides that knowledge, up to date by industry experts. I would not go without it. LISI is a must have for all in the estate planning profession!"*

Al W. King III, JD, LL.M.,  
AEP® (Distinguished)

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