Hi Steve. Before any more time passes, we wanted to share with you what we believe we discussed and agreed to at our recent meeting at Amelia Island.

Overall, we agreed to put new emphasis and energy on managing our author relationships for Tools and Techniques. To that end, we will send a letter telling the authors our new commitment and our desire to re-invigorate the Limeberg publications. In addition, we will be sending out gifts to the authors of in order to show our appreciation.

Following are the specific action items we identified for each of the publications we discussed. Much of the work here is already in progress and is noted as such.

**Modern Family**

 This book needs updating since it does not reflect the Supreme Court decision on same sex marriage. Also, the book as a whole needs to be evaluated in order to make it more specific to modern families.

A new “steward” is needed for this publication and we agreed to discuss the possibilities with Wendy Goffe in Seattle and who is well known in the field of estate planning and the modern family.

**FOLLOW UP:** We have already completed background research on Wendy and made contact with her telling her of our interest. In addition, we will be meeting Wendy in Seattle as well since we will be attending and have a booth where your publications will be highlighted. See below.

**Income Tax Planning**

This book has not done as well as we had hoped. After the meeting, Jason and I agreed that the publication is in a very crowded and competitive market in its current configuration. One way to make it stand out is to make the book more about income tax planning *as it relates to* estate planning. Basis planning and management is a huge topic in estate planning today and we can leverage that. By adding specific material on this topic, we can broaden its focus to more than just its current market.

**FOLLOW UP:**

 (1) We will contact Jay Katz and discuss this with him the issue above as well as letting him know we know about the ethics violation on him but that we are still behind him.

 (2) Bob Keebler would be a great addition to the next revision and we will follow up to see if he will co-author for us in the next year’s edition.

(3) Steve suggested Jeff Scroggin for the basis section. We have researched him and have contacted him with our interest. When we hear back, we may want Steve on the initial call.

(4) We will also contact current author Mike Jackson to find out his current level of interest in contributing to the product.

**Life Settlement Planning-**

Subsequent research has shown this book has done better than what we had discussed at the meeting. Also, the book was last published in 2008 and research shows the market for life settlement planning is coming back. We should look to do a new edition for 2016.

**FOLLOW UP**

 We have completed background research on Larry Rybka and ill contact him in the next few days to find out his interest.

**Estate Planning-**

We agree that Marty Shankman is critical to this publication and every opportunity should be taken to show our appreciation.

**FOLLOW UP:**

We received notice that Marty has moved offices. We will send him a thank you note and welcome him to his new office in a letter along with a fruit basket as a gift.

**Life Insurance Planning**

In an effort to find a steward and lend academic weight to this publication, we have already contacted Harold Skipper and also Joe Belth.

We will contact Keith Buck to thank him for his efforts, send him a gift and also ask for any feedback from the last addition.

A call is being set up with Bob Doyle to discuss CE materials he works on for after the 4th of July

An actuary would be a good addition to this publication and we are actively seeking one.

**Financial Planning**

We need a new steward for this product and have completed background research and have sent an email to Roy DeLibreto to find out his interest.

We will work with that new steward to determine if Investment Planning and Financial Planning should be made into one book.

**Other**

We have already registered to have a booth and also attend the sessions at the Seattle conference this year. We will focus the Limeberg library and also have some kind of promotion for the show.