Meeting with Steve Leimberg

6/11/15

Attendees: Steve Leimberg, Jason Gilbert, Kelly Maheu and Matt Weiner

ISSUES:

Steve identified a number of issues revolving around author relationship and management that need to be remedied.

In general, Steve felt that there was not good communication with the authors leading to hard feelings in some cases. Steve understands that the authors can at times be difficult to deal with but feels more can be done to manage the process. To better manage the process, Steve is willing to:

* Be more involved in a general sense and to be available when needed
* Join us on a kickoff call for each title we do with each author to tell them they are appreciated and to review deadlines and how important the work is, etc.
* Review marketing materials

DISCUSSION:

Specifically, we agreed to the following on these titles:

TT of Estate Planning

Marty Shankman is the key individual for this publication and should serve as editor in chief of the publication.

We should have a call with Marty and tell him how important he is to the publication of the book and to ask him what should be changed in the book by way of deletion, addition, etc.

We also should ask him who he thinks should be involved in the writing of the next edition.

**To Do: Contact Mary Shenkman for a call with Steve, Jason and myself.**

TT of Financial Planning

Marty Satinsky has personal issues and probably should not be further involved with the publication of the book in the future. Some new names are needed for this publication and Steve suggested Roy DiLibreto who does financial planning in the Philadelphia/NJ area. (www.rtdfinancial.com/about-rtd/your-team/diliberto)

He could either write or suggest someone who can and would bring a much needed practical viewpoint to the book.

Also, Steve believes the content from the TT of Investment Planning should be analyzed and then integrated with the TT of Financial Planning to create a bigger and better book that could command a higher price.

**To Do: Contact Roy DiLibreto and also review TT of Investment Planning for integration into the TT of Financial Planning**

TT of Employment Benefits and Retirement Planning

Not as much discussion on this book. Fred Reich is the main author here and should be going forward for some time. He should be contacted to talk about what needs to be added to the book or changed in some way.

**To Do: Set up a meeting with Fred Reich to inquire as to who he needs and what should be done with the next book**

TT on Life Insurance Planning

This publication needs new life and Steve suggested Harold Skipper as an important person in the field who teaches in Atlanta, GA. (Prof. emeritus Ga. State Univ.)

He also has graduate students who could write for him to make the process easier.

Keith Buck should be talked to about bringing in his team to help with the next edition. Note that we should weigh some of what gets said since so much writing could come from one company.

Two other names that would fit as possible replacements if Harold Skipper is not available would be Larry Rybka(CEO ValMark Securities) and Joe Belth (prof. emeritus at IU business school) who is a professor of insurance at ISU and does blogs and newsletters.

Bob Doyle OK to continue as author, but not suited for the “steward” role.

Also, Steve thought that the book needed some more information on actuarial and mathematics.

**To Do:**

* Contact Harold Skipper to see about his availability as an author and what content he would like to add or change. Use Larry Rybka and Joe Belth as the backups.
* Contact Keith Buck to inquire is his people would be available to help and what they would like to contribute.
* Bob Doyle-set up call for post-July 4th. Also talking to him about Ce materials he works on with his wife for Surgent-McCoy.
* Add an actuary to beef up the content in this area. (JG: David Merkel? Life actuary, has blog, works as investment advisor, has multiple TV appearances.)

TT of Income Tax Planning

We shared some issues we had discovered with Jay Katz and his law practice. After discussing the nature of the violation, Steve felt that we should contact him, let him know we know about it but let him know we believe in him and that he is still our guy on this book.

We all agreed it would be great to add Bob Keebler as an author to this publication. If he is too busy, he may well have staff who could help us.

Talk to Mike Jackson to see what his interests are. Contributed to the prior edition, but might be interested in doing more.

Steve suggested we should have more on “basis planning” and should include John J. (“Jeff”) Scroggin from Atlanta to contribute on this topic. (www.scrogginlaw.com/Attorneys/John-Scroggin.shtml)

**To Do:**

* Contact Jay Katz with Steve, Jason and myself on the phone to re-assure him
* Contact Bob Keebler to see at what level he could help if at all
* Contact Jeff Scroggin to help with basis planning
* Contact Mike Jackson

TT of Charitable Giving

Some new authors could be brought in here to give more life to the content.

**To Do:**

* Contact Kathryn Miree who does foundations (kathrynmireeandassociates.com)
* Jerry J. McCoy (www.mccoylaw.com/biography.html)
* Conrad Teitell (www.cl-law.com/conradteitell)
* Ed ??? (SL couldn’t remember last name)

TT of Modern Families

There was general agreement that too much was taken from the Estate Planning book without enough original content on the issue of modern families. It also did not cover same sex marriage because of timing issues.

Steve’s idea here is to bring in Wendy Goff ([www.stoel.com/wgoffe](http://www.stoel.com/wgoffe)) who was been involved with non-traditional families for years and is well known in the field. Paul would stay on the cover but Wendy would be the driving force behind a revision.

**To Do: Contact Wendy to see if she would be interested in helping author a revision.**

2016 REVISIONS

TT Income Tax Planning- see above

TT of Life Settlement Planning

This is a big topic but the book has done well. Steve wondered what could be done cost efficiently.

**To Do: Look at what what could be done here both as its own book and also integrating parts into TT of Life Insurance.**

OTHER IDEAS

* At various times, Steve discussed the need to touch the customer with any updates to the book, especially for six month after purchasing. He felt an email and a PDF could suit this purpose along with special discounts to purchase other books from the library.

**To Do: Look at what can be done from an update standpoint to recent purchasers and also involve marketing for bundling discounts.**

* We also discussed state tax issues in estate planning and other topics which we do not cover. Steve suggested integrating state tax content into appropriate places with charts, etc. and I suggested Richard Nenno which he agreed was a good idea.

**To Do:**

Look at how we would add state tax to relevant titles as well as publishing on our own.

Contact Richard Nenno as potential author when we know what we want to do.

* Gifts to Authors:-spontaneous, accompanies by letter describing “reinvigorated” process for books. Express warmth and appreciation for authors.

**To Do: collect list of authors, set budget, write letters.**

* Review store listings to make sure branding is consistent.

**To Do: Review store listings while creating list of authors for letters. Also review Amazon/B&N listings.**

* NU presence at Seattle Estate Planning Conference. SL to present there in 2015, is also on the board.

**To Do: Review budget, availability of conference space.**