Written Materials

Prior to scheduling your presentation, please fill out and submit the Speaker Application form on our website. This will include your substantive written materials, along with your PowerPoint slide deck. Generally, it takes 4-6 weeks to get approval for Minimum Continuing Legal Education (MCLE). Please review our "Standards for Written Materials" starting at page 6 for more detail.

Once we have approval, we can schedule your webinar, or in-person conference presentation. Please be prepared to "share your screen" for your presentation. Your slides should align with your outline, and we look for topics and materials which will appeal to estate planning professionals, attorneys, fiduciaries, financial planners, care managers and CPAs across the USA.

63 Minutes of Content

We ask that the presentation total at least 63 minutes in length. In many states, in order to certify the course for 1 Unit of CLE credit the presentation must exceed 60 minutes. Courses under 60 minutes cannot be accredited or will be accredited for .75 units – and no one takes courses that are .75 Units.

Visual Aids

Use visual aids to enhance your oral presentation, your White Board, and:

- Power Points
- JPG images
- Video
- Forms
- Demonstrations
- Spreadsheets
- Checklists
- Sample Pleadings
- Sample Letters

Release Agreement

You agree to these terms by submitting your written materials to the ITA. When logging into the Zoom presentation, all attendees are agreeing to be recorded. The recording will remain accessible to our membership, and in the video library of our vendor, for five years, or more, from the first air date. ITA reserves the right to share excerpts of the recording for promotional purposes. The recording, PowerPoint, and outline become the property of the ITA, however, the ITA recognizes you as the author/presenter, and that you will likely present much of the same material, and your expertise, to other organizations. Thank you for sharing your positive experience with the ITA with others, and please know we value your contribution of wisdom and experience for the benefit of our members.

Tips for Speakers

Research has shown that people retain:
- **10%** of what they read
- **20%** of what they hear
- **30%** of what they see
- **50%** of what they see and hear
- **90%** of what they do and discuss

To assist you in preparing for your upcoming presentation, we offer the following guidance.

Manage Audience Expectations

- State the **Learning Objectives** in the beginning of the presentation
  - State 3 things they will learn from you today
- Offer a **Summary of the Main Points** at the conclusion to explain what participants should take away from the course
  - In the wrap up, prior to Q&A, we suggest that you repeat the three things you said they would learn
- What will the participants be able to do after hearing your presentation
- It is critical that your lecture run at least 63 minutes in length

Learning Objectives

- What will your audience learn from your presentation?
- In the beginning of the video state:
  - Your blueprint or roadmap for the course
  - The main points of your presentation
  - What participants will learn when they finish your course

Know Your Audience

Our audience is a blend of professionals from the full spectrum of the trusts and estates world. Attorneys, Independent Trustees, Financial Advisors, Care Managers, and more, will be our participants. We focus on preparing our talks to meet lawyer learning requirements to meet the best standards to serve the largest variety of professionals.

If your program is designed for those new to trust practice then cover all the basics. If your program is designed for sophisticated practitioners cover the more subtle implications with more detail. We are a national provider of CLE so please tailor your presentation to a **national** audience. Provide helpful techniques and practice points where possible. Please refrain from talking exclusively about the law of one state, and make it clear which state you are speaking from the top of your presentation. Timeless advice is always welcome.

Discuss Ethical Issues & Common Errors

Discuss practical problems even if there are no clear-‑‑cut solutions. Refer to relevant ethical issues. Cite ethical rules and principles (including code sections and specific law with its source) and provide guidance on where to look for answers to questions of ethics and professional responsibility.

Practical

Emphasize the practical — what the participants in the audience will encounter 90% of the time in practice. Share the lessons of your experience and point out common practice pitfalls and strategies for avoiding them. Discuss the advantages and disadvantages of various approaches and describe techniques for handling specific problems. Try and opt for typical examples rather than unique or academic hypotheticals.

Vary Your Presentation

To keep your audience engaged, it may be useful to 'shift gears' periodically.
- Pause or change pitch, pace, or volume occasionally
- Use visual aids
- Interject an interesting and relevant story
- Pose questions to the audience
- Consider using demonstrative exhibits
    - Charts
    - Spreadsheets
    - Diagrams
    - Graphics
    - Use brief illustrations from your practice

Zoom Presentations

- This is a live presentation, with a real audience.
- Host and Presenter, we ask that you log in half an hour before your scheduled presentation. You will be asked for your cell number. Please keep your cell handy, to ease communication, outside of Zoom, in case there is a problem.
- Prior to presenting, please test your own set up. You can do this by finding your Camera app on your laptop, so you can see what your audience might see.
    - Please put a book, or something similar, to lift your laptop, or position your webcam, so that we can see you "straight on" – this will prevent your audience from seeing mostly chin, or forehead. You should be in the center, with somewhat equal space around you. Think TV journalist…
    - Please add light in front of you, behind the camera, so that we can see your facial expressions easily
    - Please reduce clutter in your background and frame yourself in the middle of the camera view. A simple light background, with your face lit is the best. Please do not have a window as your background, as this will make you hard to see.
    - If you can test your sound beforehand, please do, as some computer microphones are insufficient.
- Your host will introduce you, and set the ground rules for interaction
    - Host: Here is a short beginning script to read to the participants before you introduce the speaker:
        - Hello Everyone, my name is _____ and it is my honor to introduce today's presenter. Before we begin, we would like to ask your help in having the best recording possible. Please be sure you have muted your microphone. Please use the Q&A box to write in your questions during the talk, and we will do our best to get those answered at the end of the presentation. Please refrain from "chatting", as this can distract the presenter. Now, I would like to introduce our presenter.…
    - *Presenter, once you have been introduced, the Host will "stop video", and you will share your screen and control your own power point.*
    - *At approximately 10 minutes before the end of your presentation, the Host will turn on video and ask participants to input their questions, into the Q&A space. Host, please have one or two questions ready to ask, to get the ball rolling.*
    - *Presenter: Please repeat all questions so the viewers know what you are responding to*

Connect With Your Audience: The Camera

Even though viewers will be watching online you can still connect with your audience. Essentially, *the camera is your audience*. If you make eye contact with the camera, you will connect with your audience.

- Speak in a conversational tone
- Connect with our audience – look into the camera
- Avoid the extremes of reading directly from your text or outline
- Repeat important points
- Provide a 'roadmap' of what *has been* covered and what *will be* covered
- Use some humor to break the ice (although jokes should be avoided)
- Show enthusiasm and passion for the subject matter
- Incorporate your written materials into your presentation
- When appropriate, urge the audience to look at particular items in the written materials

Refer to Your Written Materials

To the extent that written materials expand upon or reinforce your oral presentation tie them together with an occasional comment. Use your written materials to emphasize key points. Where appropriate, ask the audience to look at particular items in the written materials

Standards for Written Materials

The ITA's focus is applied law. Program participants want you to share your *practical* experience. They need a "how to" text that can serve as a reference handbook in daily practice. Use the following guidelines when preparing the written materials for your program.

What To Include

All courses are required to have written materials. Please consider including the following:

- Case law, statutes, other sources of law
- Ethics Opinions, ABA Model Rules and other ethical sources
- Checklists, forms, or other helpful practice documents
- Other written materials that pertain to your oral presentation

Forms and Documents

Written resources are helpful to the viewer. Of particular interest are forms and documents that you use in your practice. Consider the following (please redact names and other identifying information of the parties in the interest of privacy):

- Checklists
- Timelines
- Sample pleadings
- Sample letters
- Documents providing guidance on an agency's interpretation of regulations
- The ten most commonly asked questions about your subject w/answers
- Charts
- Annotated form documents
- Complete form documents
- Bibliographies of materials that you use in your practice about your subject (with answers)

Any artwork, or graphs should be your own, or shared with permission of the author. Please note, that we reserve the right to replace any graphics in the final recording of your presentation, to avoid any copyright issues.

Know Your Audience

Keep in mind the technical proficiency level of your audience. Basic level program materials require definition of terms and a more thorough breakdown of procedure.

Distill Formal Opinions, Statutes and Articles

Summarize the key points of a particular case, statute, or article and your interpretation of its significance for your viewers/readers. Original texts of such materials should be included only if central to your presentation.

Share Your Experience in Writing

Provide your practical interpretation of the law and your suggestions on practice points and strategy. Hypothetical and real-world fact patterns – accompanied by your advice and the issues raised – will be extremely helpful to the viewer/reader.

Identify Ethical Issues & Common Practice Errors

Expose the reader to common mistakes and ethical issues, and address how to avoid them. Even if the issue is unresolved, mention and discuss it briefly.

Personal Experience

Please use examples of independent trustees who were successful in the situations you share with us.

Our audience is made up of practitioners, some brand new and some highly experienced, who serve on the front lines in trusts and estates matters. Let us know if you are open to answering further questions, at a later time, and please use your closing slide to share your contact information.

Thank You!!

Thank you for sharing your expertise with us. Please include the Independent Trustee Alliance (TrusteeAlliance.com) on your list of organizations to whom you have presented, and continue to share our organization with future audiences, so the ITA can continue to grow.