

Thank you for your interest in presenting to the members of the Independent Trustee Alliance (ITA). We offer this guide so that your Speaker Application is successful!

The ITA accepts Speaker Applications year-round. Thanks for your flexibility, as your presentation may be accepted for our in-person Annual Conference (held in Dallas, Texas, in mid-May), or for a webinar (presented from the comfort of your desk).

Every presentation must qualify for Minimum Continuing Legal Education (MCLE), whether presented at our Annual Conference, or via Webinar, and be a minimum of 63 minutes. We are looking for practical information, and general guidance based on your personal experience, with ways to apply the concepts you share.

All presentations are recorded and made available to our national membership for a period of five years. Please tie any specific statutes to the State from which you have drawn them, and create your presentation to be helpful to Independent Trustees, Attorneys and other estate planning professionals, no matter where they serve.

Please keep in mind that our members serve in every State (and in some other countries), and the Probate Code varies from State to State, so your presentation is most likely to be accepted if it highlights the relevant statutes, or case law, State or Federal, with specific citations and examples. We cannot predict the future, of course, so we recommend that your presentation be written to be valid five years from now, as best you can. We appreciate presentations which incorporate rules from more than one state, or are universal in nature, for the benefit of as many members as possible.

The process starts with the Speaker Application filled out as completely as possible. All your materials (more detail below) should be submitted with your application. The ITA reviews the submission. Provided the MCLE requirement is fulfilled, and the ITA accepts the topic as relevant to the ITA membership, your presentation is accepted and you will be informed as to our scheduling options; conference or webinar. Acceptance of presentations is strictly up to the ITA, and we do our best to inform you as soon as we can. Any presentation deemed more about “marketing” than education will not be accepted.

This guide has been designed to make your presentation experience as pleasant as possible, and to help the ITA provide the best MCLE we can. A link to the Speaker Application is provided at the end of this guide, or on our website, TrusteeAlliance.com

63 Minutes of Content

Your presentation should total at least 63 minutes in length. In many states, to certify the course for 1 Unit of CLE credit, the presentation must exceed 60 minutes. Courses under 60 minutes cannot be accredited. The extra recording time also provides us with a bit of room, as each presentation is professionally edited. Please plan for 50-55 minutes of your planned presentation, with 10 minutes of Q&A at the end.

If your presentation is accepted for our in-person conference, we will provide guidance as needed, and you will be provided a conference agenda.

Written Materials

You will be submitting your written materials directly through our Speaker Application. Slide Decks are welcome for both Conference accepted, and Webinar accepted presentations.

Please make sure your outline is thorough, ties to the same general topic order as your Slide Deck, and that your final slide provides your photo and contact information for the audience. We prefer to receive all your written and visual materials all at once, through the Speaker Application.

We suggest the following be included in your written materials:

- 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?

Visual Aids

Use visual aids to enhance your oral presentation:

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

The ITA reserves the right to replace, or remove, some, or all, of your visual aids if we are concerned about copyright infringement. Our members enjoy detailed handouts along with instructions on how to reach out to you for follow up.

Release Agreement

By applying to present to the ITA, you are agreeing to our use of your materials and image as noted in this guide, and in the Speaker Application. When logging into the Zoom presentation, all attendees agree to be recorded.

Know Your Audience

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

We welcome Beginner, Intermediate, and Advanced presentations. Keep in mind the technical proficiency level of your viewer. Beginner level program materials require definition of terms and a more thorough breakdown of procedure.

Discuss practical problems even if there are no clear---cut solutions. Refer to relevant ethical issues. Cite ethical rules and principles and provide guidance on where to look for answers to questions of ethics and professional responsibility.

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. This audience loves case studies, stories, and references to source material that they can use later.

Webinar Presentations

- Once your presentation has been accepted, your host will reach out to you to schedule your webinar.
- We use Zoom to record our webinars. You may have a live audience, or we will just be recording your presentation for our members to view later.
- Your host will exchange cell numbers with you, so you and the host can communicate, in case there is a problem with Zoom. A full recording session for a 63 minute presentation is often 2 hours. The first half hour is typically focused on set-up. The host may ask for more clarity on a particular topic, during your presentation. Our recordings are professionally edited, so the extra time melts away into a higher quality recording.

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.

- Blurred backgrounds can be a distraction, but if this is the only option you feel you have, we understand.

Sound - If you can test your sound beforehand, please do, as some computer microphones are insufficient.

- We recommend using an external USB microphone, as this makes the audio MUCH better (these can be purchased for around \$30-\$50).
- We recommend a wired internet connection, or placing your computer close to your WiFi source (5g is better than 2g), with all other internet using programs closed.
- Please silence notifications on your computer.

Your host will introduce you, and set the ground rules for interaction

Host: Here is a short sample script to read to the participants before you introduce the speaker:

Hello Everyone, welcome to another great Independent Trustee Alliance Webinar. 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 tell you about our presenter....

Presenter, once you have been introduced, the Host will "stop video" for themselves, and you will share your screen and control your own slide deck.

At approximately 10 minutes before the end of your presentation, the Host will turn on their 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.

For both Presenter and Host, please repeat all questions so the online viewers know to what you are responding.

Connect With Your Audience Virtually

These days, many of us have a lot of practice with virtual meeting tools, but just in case you have not yet had this personal experience, here are a few more suggestions:

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
- Repeat important points
- Provide a ‘roadmap’ of what *has been* covered and what *will be* covered
- Use some humor to break the ice (although “telling jokes” should be avoided)
- Show enthusiasm and passion for the subject matter
- Incorporate your written materials into your presentation, noting where you are in the materials, from time to time, for the audience following along
- When appropriate, urge the audience to look at particular items in the written materials, encouraging interaction and practice

Thanks again for your interest in presenting to the members of the Independent Trustee Alliance. You may complete your Speaker Application by clicking [here](#).