



February 2022, Issue Two

National Association of Estate Planners & Councils Minute

· the administrative update for affiliated local council leaders ·

This email is being sent to you as an officer, director, or staff executive for your NAEPC-affiliated local estate planning council; all board members currently on file with NAEPC receive the email.

HIGHLIGHTS

- March & April Events in the Council Leader Education Series
- Webinar Series “Pick Four” Opportunity
- Council of Excellence Application

QUICK CLICKS

- [Join the Council Leader Group on LinkedIn](#)
- [Board Update Form](#)

IN EVERY ISSUE

- Advanced Estate Planning Strategies Conference
- Robert G. Alexander Webinar Series
- Benefits Available to Members of Your Council
- Connect with Us on LinkedIn

IN A HURRY?
SCAN FOR **[HOT TOPICS]**

March & April Events / Council Leader Education Series

Website Tutorial: Maximizing Event Planning Efficiency Using Event and RSVP Management

Wednesday, March 02, 2022 from 2:00 pm ET - 3:00 pm ET

[Learn More & Register](#)

Roundtable: Imagining Your Council Post-COVID - Strategies for Sustaining Membership and Engaging Members in New and Different Ways **[HOT TOPIC]**

Friday, April 22, 2022 from 1:00 pm ET - 2:00 pm ET

[Learn More & Register](#)

Roundtable: The [Council Nominated AEP® Program](#) and Its Benefit to Your Estate Planning Council

Wednesday, April 27, 2022 from 4:00 pm ET - 5:00 pm ET

[Learn More & Register](#)

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Webinar Series Pick Four Opportunity

[HOT TOPIC] We understand that your council wants and needs compelling virtual programming options to supplement its regular calendar of events, especially during the pandemic. NAEPC is offering affiliated councils on-demand* access to any four webinars for a reduced cost of \$400. Councils that wish to offer continuing education credit must become the provider with their state and/or governing body. [Contact Sarah Butterfield](#) to learn more about this benefit.

*NAEPC provides a website link and a password to the recorded version of the webinar, which is used to show the program to council members and guests gathered together on a virtual meeting. Please schedule your showing at least three business days after the live webinar.

Council of Excellence Application

The 2022 Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award application is available and is requested back on or before Friday, May 13, 2022.

The award recognizes councils that provide a strong multi-disciplinary experience for their members and honors those that truly work to provide an exceptional member experience. We also consider the application to be a roadmap of best practices; things that help a council run smoothly and support a great member experience. The application is also a reciprocal learning experience. The narrative portion gives NAEPC an opportunity to learn more about your council and what is happening within the council network. > [Download the Application](#)

59th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Estate Planning Council Leaders

November 15 – 18, 2022 · Fort Lauderdale Marriott Harbor Beach Resort & Spa

It's never too early to plan to attend **and** to start sharing details about the conference with the members of your council. Attendees will experience everything the NAEPC Advanced Estate Planning conference is known for – good company, great food, exceptional educational content, and access to new technology, tools and firms in the exhibit hall. Speakers and topics will be released soon and registration opens in late April!

Don't forget that council executives (paid staff members) attend the Tuesday and Wednesday sessions with the registration fee waived and participate in special executive-only events and meetings.

- [Add the Conference to Your Calendar](#)
- [Find More Information on our Website](#)

Robert G. Alexander Webinar Series

The [Robert G. Alexander Webinar Series](#) provides councils and their members with accessible and affordable virtual education. Programs are available live and on-demand and one can choose to register for individual programs or for a series subscription. Councils can also register for a group gathering, which provides one feed to be shown to a group gathered together in a single location.

Continuing education credit is available at most NAEPC-hosted webinars for Accredited Estate Planner® designees. In addition, a general certificate of completion will be available for those professionals who feel the program satisfies their continuing education requirements and are able to self-file.



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Upcoming Webinar

[Hot Topics in Estate Planning \(Finding Gems in the Ashes of the Dumpster Fire\)](#)

Paul S. Lee, JD, LL.M. (taxation), AEP® (Distinguished)

Wednesday, March 9, 2022 from 3:00pm - 4:00pm ET

TCJA, COVID-19, and Congress have and will change everything we know as planners. Significant tax code changes are on the horizon. This presentation will discuss straightforward and innovative planning opportunities for families that best take advantage of both the “expiring” and “permanent” provisions of the tax law, with an eye toward anticipated changes to the future planning landscape.

> Learn More and Register for the Council “Pick Four” Program, the Series, or Individual Programs at <https://www.naepc.org/events/webinar>.

Member Benefits

Members of your affiliated local council have access to a wide array of benefits at reduced or no cost. These offerings are a great way to build upon benefits your council is already offering with no additional work by your board! > See the [full list of opportunities](#).

Connect with NAEPC and our Members on LinkedIn

[Council Leader Group](#) (private for council leaders)

[General Group](#)

[Accredited Estate Planner Designee Group](#) (private)



NAEPC Minute is an administrative report that does not take the place of [NAEPC News](#), the official newsletter of the NAEPC, sent to the members of those councils that have approved access through the [Every Council Campaign](#). Please contact the national office if you have questions about your council’s status within the Every Council Campaign.



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