

October 10, 2022

## 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

- 59<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Estate Planning Council Leaders; How Your Council & Members Can Participate (*Virtual Attendance Now Available*)
- New Consumer Videos, Just in Time for National Estate Planning Awareness Week
- October 19 Roundtable: The Benefit of Having a Council Staff Executive

### QUICK CLICKS

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

### IN EVERY ISSUE

- Robert G. Alexander Webinar Series
- Benefits Available to Members of Your Council

IN A HURRY?

SCAN FOR **[HOT TOPICS]**



**59<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference  
with Pre-Conference Sessions for Estate Planning Council Leaders; How Your Council & Members Can Participate**

[Download the Brochure](#)

[See Complete Conference Details](#)

[Register by October 18<sup>th</sup> for the Regular Rate](#)

[Reserve a Hotel Room @ Marriott Harbor Beach by October 17th](#)

*Councils & Their Leaders Can...*

- Attend an entire day of in-person sessions and topic-based [learning pods](#) devoted to council operations and SUCCESS
- Meet others from across the country who serve in a volunteer and staff role for their local estate planning council
- Take new ideas and initiatives back to your council
- Participate in the educational portion of the conference

**Our New Address:** 2001 Crocker Rd., Ste. 510  
Westlake, OH 44145  
[councilservices@naepc.org](mailto:councilservices@naepc.org) · 866-226-2224

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*Council Members Can...*

- Attend in-person or virtually to participate in 2 ½ days of education and social networking alongside members from councils from across our country (single day passes are also available)
- Learn from the leaders within the profession who will be addressing important topics and planning strategies
- Earn national *and* multi-disciplinary continuing education credit



**We need your council's help to spread the word about the annual conference to your board and members. Please share the conference brochure and webpage in an email to your members this week!**

**New Consumer Videos, Just in Time for National Estate Planning Awareness Week**

New in 2022, NAEPC has teamed up with profession leader Martin M. Shenkman, LawEasy, and several guests to provide NAEPC members with access to short videos dedicated to consumers. You are welcome to share these videos as you wish leading up to (and during) National Estate Planning Awareness Week this October 17 - 23, 2022. > Learn more at <https://www.naepc.org/affiliated-councils/awareness>. We thank Marty Shenkman and his expert guests for sharing their time and talent on this initiative.

**October 19, 2022 Roundtable: The Benefit of Having a Staff Executive**

Having a staff executive / administrator gives your board of directors an opportunity to focus on important tasks like growth, direction and new initiatives. This session is designed for councils that do not currently have a staff member in place and will address: the importance of having someone in a staff role; how all councils, regardless of size, can benefit from having a staff executive; what these individuals typically do for an association; how a staff executive interfaces with the board of directors; and how to find qualified individuals to take on this important role. Please note that given the wide range of duties and significant differences in areas of the country, we will not be discussing compensation during this event. > [Learn more and Register](#)

**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 register for individual programs or for a series subscription. Councils can also register for a group gathering or the "Pick Four" package, both of which provide one feed to be shown to a group gathered together in a single location (in-person or virtually).

**Next Webinar**

Special Needs Planning: What Estate Planning Practitioners Should Know

Wednesday, December 14, 2022 · 3:00 pm ET - 4:00 pm ET

Elizabeth Forspan, Esq. of Forspan Klear, LLP, a New York-based Estate Planning and Elder Law firm, will discuss the various aspects of planning for those with disabilities as well as planning for clients with family members who are disabled and in receipt of government benefits. The program will include a discussion of Supplemental Needs Trusts and the taxation of such trusts. Elizabeth will also review important information regarding guardianship and conservatorship proceedings as well as planning with advance directives.

> [Learn More and Register](#)

> Learn more about the webinar series, register for the council "Pick Four" option, the series, or individual programs [HERE](#).

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### 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](#).



*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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### Connect with us on LinkedIn

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

[General Group](#)

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

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