

MEMORANDUM

To: [Council Name] Board of Directors

From: [Conference Attendee and Position with Council]

Date: [Enter]

Re: National Association of Estate Planners & Councils Post-Conference Report

TRAVEL LOGISTICS

Enter details on your travel to and from the event here, cost, etc.

CONFERENCE LEADERSHIP DAY LEARNING POD REPORTS

In this section of the memo, include your notes and new ideas from each of the learning pods you attended. You can also jot down the number of attendees, council names, etc.

ANNUAL MEETING & AWARDS LUNCHEON

Use this section to share your notes from the Annual Meeting & Awards Luncheon, including those with whom you were seated with for easy follow up.

COUNCIL BY SIZE SHARING SESSION NOTES

Use this section to share your notes from the Council by Size Sharing Session. You may also want to attach the talking points from this session as a reference.

FIVE BEST IDEAS OR NEW INITIATIVES

Use this section to recap your five favorite ideas from the day and to note any new initiatives you would like your board to consider based on these ideas. This is also a good area in which to offer a report on areas the council specifically wanted you to cover during your time at the conference.

SPEAKERS

Utilize this section to share information about the conference presenters or others you met with during the program that you feel may be a good fit for your council and its programming schedule. This is also a great area to include “must cover” topics for your next programming meeting.

CONTINUING EDUCATION CREDIT

Share any notes about CE credit associated with the conference and the process by which attendees receive credit within this section.