



# National Association of Estate Planners & Councils

...serving affiliated local councils and their members

## NAEPC NEWS

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[WWW.NAEP.C.ORG](http://WWW.NAEP.C.ORG)



### Message from the President



Dan H. Florence, JD, AEP, CTFA  
Dallas, TX

As we begin the new year, I wanted to tell you about some of the accomplishments of NAEPC in the past year. Notice I said "some" as there will be more to come in future newsletters!

The NAEPC is proud to have named their first Distinguished Accredited Estate Planners this year. This was done under the leadership of Gary Flotron, the chairman of the Accredited Estate Planner committee. The Distinguished AEP honor is given in recognition of the recipient's outstanding contributions to the field of estate planning. The 2004 recipients were Byrle M. Abbin, Ben G. Baldwin, Jr., Lawrence Brody, Jonathan G. Blattmachr, Natalie B. Choate, S. Stacy Eastland, Stephan R. Leimberg, Susan Porter and Frank L. Rainaldi. Please join me in congratulating these individuals when you see them at your local council meetings. You can find information on the national web site as to how to become an AEP. In addition, the NAEPC also allows the local council leaders to nominate candidates for the AEP designation each year. Be sure to ask your local leadership what their procedure is for nominating AEP candidates!

The NAEPC held its 41<sup>st</sup> Annual Conference in Atlanta, Georgia this last October. Council Leadership Day was attended by 100 local council leaders that spent a full day learning what other affiliates are doing and gathering ideas to take back to their councils. We were then joined by an additional 150 folks for two days of outstanding speakers such as Jonathan Blattmachr, Steve Leimberg, Stacy Eastland and Jeffrey Pennell. If you did not get to attend last years meeting in Atlanta, please mark your calendar for September 14<sup>th</sup> - 16<sup>th</sup>, 2005 and join us in North Texas at the Gaylord Texan Resort and Convention Center for the 42<sup>nd</sup> Annual Conference. We have asked Jonathan Blattmachr and Jeff Pennell to join us in North Texas to speak on new topics. They will be joined by Natalie Choate, Stanley Johanson and a host of local speakers to, again, provide you with a wealth of information and update you on the latest trends and tools. You can find additional information in this newsletter and on the web site at [www.naepc.org](http://www.naepc.org).

The last accomplishment I will mention this time is this newsletter. Barry McCrory, the chairman of the Outreach committee, along with committee member Bill Super, decided that we needed to communicate with the local council leadership and Accredited Estate Planners in a regular manner. This newsletter is the result of their hard work. It will be produced on a quarterly basis and will be sent via email to the local council leadership. I'm asking you to forward it to your members by email or have copies available at an upcoming meeting. I hope you find it informative and interesting.

I am very excited about what the NAEPC has planned for the coming year. Please look for my message in future issues and find out what other things we accomplished in 2004 and what great things we have in store for 2005. I look forward to meeting you in September 2005 in North Texas and introducing you to our outstanding officers and board members.

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### SAVE THE DATE!

Mark your calendar NOW  
for the NAEPC's 42<sup>nd</sup>  
Annual Conference!

Join fellow council leaders  
in Grapevine, Texas from  
September 14 – 16, 2005.

In addition to exciting  
council-based education,  
our technical speakers  
include Jonathan  
Blattmachr, Natalie Choate,  
Stanley M. Johanson &  
Professor Jeffrey N. Pennell!

More details will be posted  
on [www.naepc.org](http://www.naepc.org) soon!

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## National Association of Estate Planners & Councils

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### Highlights from the NAEPC's 41<sup>st</sup> Annual Conference

The NAEPC Board of Directors is proud to report that the 41<sup>st</sup> Annual Conference was a smashing success! Over 350 registrants gathered for 3 full days of education, including one day of council leadership development and 2 days of technical education.

Here's what the attendees had to say...

#### **Council Leadership Day Sessions** ~

- ❖ The interaction with other councils was the best point of the day! Understanding what works (or doesn't) is great!
- ❖ Informal nature and small size of break-out session was conducive to an honest and frank exchange of ideas.

#### **Educational Sessions** ~

- ❖ One of the best overall estate planning conferences I've attended, excellent technical & non-technical, quantitative & qualitative mix of topics.
- ❖ More should attend to enjoy the commrodery and experience some enlightenment!



Don't miss the opportunity to experience it for yourself!

The 42<sup>nd</sup> Annual Conference will take place in Grapevine, TX  
*...where Dallas and Fort Worth meet!*



**September 14 – 16, 2005**

**Gaylord Texan Resort  
& Convention Center**



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## National Association of Estate Planners & Councils

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### NEW MEMBER BENEFITS

...available to members of all NAEPC affiliated local councils!

#### Resonate, Inc. Offer ~ Just for NAEPC Members!

It was my privilege and honor to join you this past October, in Atlanta, as a speaker at your NAEPC 41<sup>st</sup> Annual Conference. At that time, I told you about the Client Centered Planning System™ training that combines sound psychological information about client decision making with estate planning.

With the motivation for estate planning rapidly shifting, this system is a break thru and a must for estate planning professionals. The likely change in the estate tax law and the recently documented quest of wealthy consumers for the “enriched experience” is escalating the need to shift from traditional estate planning that was once based on fear, tax-avoidance and asset protection. You must make the transition to focus planning on your client’s values and visions.

Many people have lost significant amounts of trust in their employers, church leaders, government and/or family members in these recent and very stress-filled years. Clients are no longer willing for advisors to simply “tell them what to do”; they want to be more informed - to partner - in the decision-making. They must trust us to partner with us.

Therefore it is essential for the successful advisor to know how to lead clients to make the decision to trust him or her. There are certain and specific behaviors, actions and language that lead to the creation and retention of trust. Master these and people will easily make the decision to trust you.

Join us for a 30-minute national seminar and learn how you can connect your ability to create “trust” with increased bottom line results.

#### Register For The Free Seminar/Conference Call “Trust” Is Not A Feeling; It’s A Decision.

Hosted by Barbara A Culver, CFP® ~ Researched with Dr. Terry Hunt, Ph.D.



1. Three requirements to earn trust quickly
2. How to keep trust once earned
3. How to regain lost or damaged trust

Industry leader and pioneer Barbara A. Culver will share the extraordinary results that can be achieved as you apply these secrets in your personal and professional lives.

Hear more about **Client Centered Planning System™**.

Advanced training to build the skills that create lasting relationships with your clients and their families.

RSVP for  
Teleconference  
HERE

**Thursday, Jan. 28<sup>th</sup>, 12:00 Noon EST**

**Dial: 323-785-4156**

**Access Code: 122516#**

**RSVP for Teleconference Today – Lines are limited.**

Learning how to create and retain trust is the foundation of the Client Centered Planning System™. The system will provide you with the training, support tools and coaching you need to guide and motivate your clients through a planning experience that is based on family values and family visions combined with cutting-edge strategies.

#### **NAEPC MEMBERSHIP HAS ITS REWARDS**

As a member of NAEPC, your commitment to offering your clients the best is being rewarded. I am extending you a very special **\$200.00 association discount** for the Client Centered Planning System™ training program being offered March 10<sup>th</sup> and 11<sup>th</sup> in Chicago. In addition, we will also extend the early registration discount deadline to February 11<sup>th</sup> 2005.

**Register before February 11<sup>th</sup> and receive an additional \$100 off, totaling \$300.00 in discounts!**

**To register for training, visit our special NAEPC page at:**

[www.resonatecompanies.com/ccpsnaepc.html](http://www.resonatecompanies.com/ccpsnaepc.html)

For more information about the call us at 800-984-5101 x5



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### NEW MEMBER BENEFITS... continued

#### **Kettley Publishing Software ~ Save \$418 on all 3 modules or \$80 on each individual!!**

Through a special arrangement with Kettley Publishing Company, NAEPC is pleased to make a very special opportunity available just for members of your local council. Members can subscribe to the nationally-recognized Kettley software solutions at great savings. Included in this special offer is *Back Room Technician*, the industry standard source of client proposal information and concept material. Follow this link ([www.naepc.org](http://www.naepc.org)) or visit the NAEPC website, click "Member Services" and then on the link at the bottom of the paragraph to take advantage of this wonderful offer!

### ACCREDITED ESTATE PLANNER DESIGNATION

Professional estate planners can now achieve an accreditation that acknowledges their experience and specialization in estate planning!

An Accredited Estate Planner (AEP) is a person who has earned a graduate level specialization in estate planning in addition to already recognized professional credentials within the various disciplines of estate planning.

The designation is awarded by the NAEPC to recognize estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation and character. An AEP must embrace the team concept of estate planning, adhere to the NAEPC's professional code of ethics, and maintain membership in their nearest affiliated local council.

As a part of the NAEPC's advocacy program, Accredited Estate Planners will be given priority in requests for referrals that result from NAEPC promotion and advertising campaigns. In addition, NAEPC promotions will prominently feature the AEP designation and the advantages of working with an AEP professional.

For more information visit [www.naepc.org](http://www.naepc.org) and click on the Accredited Estate Planner tab!

### NAEPC SPEAKER'S BUREAU

Does your council need a speaker? ***The NAEPC can help!***

The NAEPC Speaker's Bureau is a tool to help you find a qualified speaker able to speak on a wide variety of topics. The Bureau is searchable by state, topic, keyword or name and lists topic and contact information for each speaker. We're here to help you build a dynamic program for your local council! Visit [www.naepc.org](http://www.naepc.org) and click "Speaker's Bureau" to get started.

Interested in being added to the Speaker's Bureau?

Those interested in being added to the online directory should call the NAEPC office at (866) 226-2224 for details.

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