



National Association of Estate Planners & Councils

...serving affiliated local councils and their members

NAEPC NEWS

JUNE 2005

WWW.NAEP.C.ORG



Message from the President



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

As a continuation of my first message, I would like to tell you about some of the additional accomplishments of your organization.

The NAEPC has continued to upgrade the web site packages available to our councils. As a review, NAEPC offers a free web site, or Splash Page, to every member council. Your council has a web site whether you knew it or not! The Splash Page lists your council contact information and is maintained by the National Office free of charge. The Level 2 website package enables your council to maintain your membership directory online and allows for printing of the directory of members, if your council desires. The site also can be used to notify the membership of upcoming meetings by either email or fax. This site costs your council only \$800 per year. A Level 3 web site has all of the features of the previous sites with the addition of allowing your members to respond to meeting notices online and reserve a place for the meeting, complete with accepting a credit card number via the secured site! The Level 3 site costs only \$1,200 per year. Why should your council not take advantage of the web to benefit your membership? Please call Kim Hronek at the NAEPC office if you are interested in obtaining more information about a Level 2 or 3 website package.

The NAEPC will hold the 42nd Annual Conference in North Texas in September of this year. The conference will be hosted by the Estate Planning Council of North Texas and will be held at the new Gaylord Texas Resort in Grapevine, Texas. A star-studded lineup of speakers is ready to introduce you to "New Ideas in the Old West". The speakers include Natalie Choate on Practical Planning for Retirement Benefits, Susan Porter on Exercising Discretion in Discretionary Trusts and Jonathan Blattmachr on the Latest Planning Strategies. The second day includes Stanley Johanson on Recent Developments Affecting Estate Planning and Jeffrey Pennell speaking on An Update on Current Estate Planning Changes. Locally recognized speakers will complete the schedule for each day. A brochure can be found online at www.naepc.org. We will also offer a taste of the west during Thursday's Social Event with a trip to the famous Joe T. Garcia's Mexican Restaurant and a chance to do some "boot scooting" at Billy Bob's Texas.

I am very proud to be a member of the NAEPC and proud to be associated with such a dynamic organization. I hope you feel the same. We are continuing to work for your benefit and for the benefit of your council. If you have any suggestions, please let myself or any of the officers or board members of NAEPC know your concerns or suggestions. You can find us on our website at www.naepc.org or by calling the National Office.

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Don't miss the opportunity to attend the NAEPC's 42nd Annual Conference!

September 14 – 16, 2005

Grapevine, Texas

...where Dallas & Fort Worth meet!

Conference information is available on page 2 of this newsletter!

You are receiving this message as a leader of an affiliated local council, past president of the NAEPC, Immediate Past President of a NAEPC Affiliate, or Accredited Estate Planner. To remove your name from the list, please send an e-mail to admin@naepc.org with your name, e-mail address and "unsubscribe" in the subject line.



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42nd Annual Conference Information

A complete schedule of events can be downloaded at <http://www.naepc.org/convention.web>.

NEW IDEAS IN THE OLD WEST
co-hosted by The Estate Planning Council of North Texas



September 14 – 16, 2005
The Gaylord Texan Resort & Convention Center



Education

Whether you're looking for fabulous new ideas from other council leaders or cutting-edge technical information, **this is the event for you!**



Meet and **share ideas** with leaders and administrators representing councils throughout the country!

Networking

Fun

Take the train into the Fort Worth Stockyards for an evening of **dinner and dancing!** Register a companion for the tours to the Fort Worth Museums, Grapevine, TX and Dallas West End.



Technical Speakers...

Thomas C. Baird, JD	Jonathan G. Blattmachr, JD
Michael V. Bourland, JD, LL.M.	Natalie B. Choate, Esq., AEP
Thomas F. Commito, JD, LL.M., CLU, ChFC	Trey Cousins, III, JD, LL.M., CPA
Deborah Cox, JD	W. Michael Cox
Jaye Crowder, MD	Mike Hill, FASA, CBA
Elizabeth A. Howard, JD	Stanley M. Johanson, JD, LL.M.
Paul S. Lee, JD, LL.M.	Mario A. Mata, JD, CPA
Jeffrey N. Pennell	Susan Porter, JD, LL.M., CTFA, AEP
Mike Seefeld, MS, CPA	Terry L. Simmons, JD, LL.M.

NOW AVAILABLE

The NAEPC has a limited number of Ashworth golf shirts with the NAEPC logo available for sale!

Shirts are \$25/each and sizes range from XL – XXXL!

Contact the National Office for more information!

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MEMBER BENEFITS

Your Council's membership in the NAEPC makes it possible for your MEMBERS to take advantage of the exciting programs, services and discounts offered by the NAEPC.

A complete list of member benefits can be found by following this link to the NAEPC website: http://www.naepc.org/member_services.web. Please take a moment to share this information with your entire membership!

Please take some time to review these **EXCITING NEW BENEFITS** with your membership as well...

Kettley Publishing Company

Through a special alliance arrangement recently refined with Kettley Publishing, NAEPC is pleased to make their nationally recognized "solutions" software available to members of your Council at special NAEPC discount prices! Kettley's flagship product-Back Room Technician-is a key resource for more than 50,000 financial professionals, providing easy-to-understand, compliant and compelling illustrations and reports of today's most important financial concepts and strategies. Integrated with Back Room Technician, Kettley's "Advanced Planning Solutions" software for estate, business and charitable giving analyses, along with "Financial Planning Solutions" for basic retirement, college funding and survivor needs planning, provide a complete tool kit for serving almost all of your clients' needs.

We have also negotiated a special discount for Kettley's unique "small group version" of the Kettley software. The small group version is ideal for firms/councils as small as ten members (or as many as 200), with significant savings per user. We encourage you to learn more by clicking on the Kettley link within the "Member Services" section of the NAEPC website, www.naepc.org. You may also order a free demo of the Kettley software from this site.

Thank you!

You are providing your council members with a valuable tool by maintaining a relationship with the NAEPC... be sure to review the benefits with them often!

COMING ATTRACTIONS...

Watch your e-mail inbox for exciting new details about the following upcoming programs:

- CCH
- Civicom
- Konika / Minolta



Don't forget... a complete listing of the benefits offered by the NAEPC can be found online at www.naepc.org in the "Member Services" section!

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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 designation 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.

Did you know that your council is able to nominate folks for the **Council Nominated AEP Designation**? A decision was made to allow affiliated local estate planning councils to honor their most highly respected and distinguished members by nominating them to receive the AEP designation as a Council Nominated Candidate. Your estate planning council has been authorized by the National Association of Estate Planners & Councils to recommend for the AEP designation individuals from each of the following five disciplines: Attorney, CPA, CLU, ChFC/CFP®, and CTFA. If your council has a membership of 100 or less, you can designate one individual from each of the five disciplines per calendar year. If your council has a membership of more than 100, you can designate two individuals from each of the disciplines per calendar year.

The individuals nominated to receive the AEP designation must have a minimum of 15 years experience in estate planning and estate planning activities and will be subject to current AEP qualifications and requirements, except the requirements for professional references and affiliated local estate planning council membership verification. The application fee for these candidates will be \$125, which is 50% of the usual fee. A Board Resolution must accompany all Council Nominated Candidate applications. This Resolution, along with the Council Nominated AEP Application, can be found online at www.naepc.org.

NAEPC SPEAKER'S BUREAU

It's that time of year again! Offering educational, cost-effective programming is a struggle faced by many organizations. The NAEPC Speaker's Bureau is a tool to help you find a qualified speaker able to talk 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 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. An interested party must first speak to an affiliated local council and have a current Board member from that council write a letter of recommendation to the NAEPC.

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COUNCILS IN THE NEWS . . .

Cleveland, Ohio

The **Estate Planning Council of Cleveland** recognized their 5th Annual Distinguished Estate Planner at an award luncheon on June 14, 2005.

Congratulations to Roger L. Shumaker, Esq., a shareholder with the Cleveland-based law firm of McDonald Hopkins Co., LPA!

New York, New York

On May 10, 2005 **The Estate Planning Council of New York City** presented it's annual conference Estate Planners Day to a vibrant, sold-out crowd at the Princeton Club of New York. The event, featuring 8 nationally acclaimed speakers and numerous exhibitors, brought together experienced individual and family advisors from the fields of law, insurance, banking, financial planning and accounting for the purpose of sharing their knowledge and experience in these increasingly interdependent disciplines. For the exhibitors, Estate Planners Day offered an unusual opportunity to reach a broad cross section of professionals, all within the lively and social context of extended refreshment break sessions. The Council is looking forward to an equally successful event next spring!

Did you know?

The NAEPC Staff can provide you with referrals for gifts & outgoing President plaques!

We also have the NAEPC logo available in an electronic format for those councils that wish to include it on their gifts, plaques or stationery. Call (866) 226-2224 for details!

New Orleans, Louisiana

The **New Orleans Estate Planning Council** has just celebrated its 40th Anniversary! A total of 35 combined Founding Members and Past Presidents were present at a general membership dinner meeting honoring this occasion.



Jackson Square

40th Anniversary Celebration



NOEPC is now eagerly planning to host the NAEPC's 43rd Annual Conference in New Orleans November 1-3, 2006. Many outstanding speakers have already committed to be on the program. The Astor Crowne Plaza Hotel on Canal Street at Bourbon Street is the conference hotel, and the Thursday Mardi Gras themed evening gala will be held at the historic Presbytere at Jackson Square in the heart of the French Quarter. Members of NOEPC will be at the 2005 Conference in Texas in September – you will find them wearing the Mardi Gras colors of Purple, Green and Gold! They will be glad to talk with you about the 2006 Conference.

Does your Council have news that you would like to share in this newsletter? Please contact the National Office for more information! (866) 226-2224

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