



National Association of Estate Planners & Councils

...serving affiliated local councils and their members

AEP ALERT

...THE OFFICIAL NEWSLETTER FOR ACCREDITED ESTATE PLANNERS

SEPTEMBER 2005

WWW.NAEP.C.ORG



Message from the Chair

Gary L. Flotron, MBA, CLU, ChFC, AEP

St. Louis, MO

Welcome to the first edition of the *AEP Alert*, the official newsletter for Accredited Estate Planners. With this new publication, the AEP Committee continues its commitment to encourage and disseminate research, discussion, and debate with respect to all of the complex estate and tax planning issues that affect the day-to-day practices of our membership. This newsletter will be published on a regular basis and will highlight organizational news and practice tips.

During the last year the AEP committee has worked extremely hard to enhance the value of your AEP accreditation and maintain its status as the nation's premier estate planning designation. At our monthly AEP committee meetings, we constantly discuss new ideas, opportunities, and member benefits for our AEP membership. To that end, the AEP committee is pleased to have realized the following goals in the last year all of which will greatly enhance the benefits and prestige of your AEP accreditation:

- Completion of the AEP Value Proposition Task Force Report.
- Assisted with the incorporation of the NAEPC Foundation. Its purposes will include the promotion of public awareness of estate planning, the team concept of estate planning, and provide continuing education programs for AEP/NAEPC members.
- Publication of *The AEP Journal of Estate and Tax Planning*. The first issue of this professional journal will be published in the spring of 2006 and will focus on scholarly, in-depth articles, analysis and practical planning ideas for AEP's.
- Inauguration of the NAEPC's annual awards for the best estate and tax planning articles published during the previous year.
- Discounts on CCH's Viewplan software, significant discounts on CCH's catalog of tax and accounting books, and Kettley Software.
- Publication of an AEP consumer tri-fold.
- Publication of AEP recruiting materials. (Fall 2005)
- Election of the 2005 Class of Distinguished Accredited Estate Planners (DAEPs).

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Did you know?

We have the AEP logo available in an electronic format for use on letterhead and business cards?

Call
(866) 226-2224
for details!

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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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DESIGNATION BENEFITS

Your continued maintenance of the AEP Designation makes it possible for you 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 some time to review this **EXCITING NEW BENEFIT** as well...

NEW MEMBER BENEFIT FROM CCH!

CCH, one of the nation's leading publishers of tax, accounting, and information services, offers a wide range of quality products for the professional market. Their publications and products provide readers with in-depth analysis, practical guidance, and how-to knowledge. CCH's authors are well-known experts in their individual fields with years of experience. CCH's dedicated editorial staff insures that the information contained in their publications is reliable and up to date. Their publications provide the resources professionals need to work efficiently and effectively with their clients.

CCH VIEWPLAN ESTATE PLANNING SOFTWARE

We have negotiated an arrangement with CCH to offer CCH's "Viewplan" estate planning package at a 15% discount to our members. Viewplan Advanced is one of the nation's premier estate planning programs, a standout estate and retirement planning system that provides planners with the flexibility to create simple or complex scenarios and output reports that clients can easily follow in either text or graphical format. This program earns its distinction through its easy and elegant planning features. There will be additional benefits available to AEP's who purchase this software through this special offer.

THE CCH BOOK DEAL

Currently your AEP committee is completing a contract to provide our members with a link through the NAEPC website to the entire CCH book catalog. Each of the individual titles in the CCH book catalog will be available for you to purchase from CCH at a member discount of 30%.

Other information regarding these products and services will be available to you on the NAEPC website (mid-September 2005) or you can contact the NAEPC office for further information.



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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Message from the Chair, continued...

Remember, your AEP designation is the only graduate level accreditation that focuses specifically on estate planning. As AEP's we provide the highest quality professional advice and set the highest standard of knowledge, skill, and experience throughout the estate planning industry. As AEP's we offer expertise, experience, multiple disciplinary planning, and adherence to a strict professional code of ethics. Wear your AEP pin with pride—you are a member of an elite group of highly credentialed estate planning professionals dedicated to providing the highest quality service to our membership and the estate planning community at large.

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 me 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.

ACCREDITED ESTATE PLANNER DESIGNATION... new programs!

Did you know that your affiliated local 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.

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NAEPC SPEAKER'S BUREAU

The NAEPC Speaker's Bureau is a tool to help NAEPC Affiliated Local Councils 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.

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. The remainder of the details are handled by the NAEPC's Administrative Office.

VALUE PROPOSITION TASK FORCE REVIEW

In the fall of 2004, the NAEPC Board of Directors formed the AEP Value Proposition Task Force. The task force members consisted of select members of the NAEPC Board of Directors and a number of distinguished AEP practitioners throughout the United States. Strategic in nature, the report recommended long range objectives and goals designed to increase the recognition and value of the AEP designation. The full text of the AEP Value Proposition Task Force Report is available to you by calling the NAEPC office.

The primary goal of the task force was to establish the AEP designation as the nation's premier professional estate planning designation, a designation dedicated to providing the highest quality service and products to our fellow AEP's and to the general public, a designation dedicated to the proposition of the team concept of integrated estate planning. The task force recommended establishing continued programs of marketing and promotion to fellow professionals and the public at large, information exchanges, newsletters, and continuing education programs. The task force also recommended establishing the AEP Value Proposition Committee as a permanent sub-committee of the NAEPC charged with establishing specific short term and long range strategies and projects to implement the recommendations set forth in the report. The entire report was adopted by the NAEPC Board of Directors, and your AEP committee already is hard at work implementing the recommendations of this report.

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