



National Association of Estate Planners & Councils

...serving affiliated local councils and their members

NAEPC NEWS

MARCH 2006

WWW.NAEPc.ORG



Message from the President



Carol E. Tully, JD, CPA, AEP
Boston, MA

I would like to offer you an update on the accomplishments of the NAEPC. 2005 proved to be an outstanding year for membership, organization and outreach to our councils. This newsletter offers just some of the many details.

Our organization welcomed 18 new Affiliated Local Councils in 2005! This record number is due in part to the contributions from our many NAEPC Committees. Our volunteers are committed to ensuring that each new and returning Council has a rewarding experience. From the new Member Benefit programs outlined in this newsletter to the dedicated service of the Accredited Estate Planner & Council Relations Committees, we hope that you feel that we are offering you and your members valuable products and services and a designation that you can be proud of. As we continue to expand our products and services and improve our communication to local councils and their members we are actively looking for new volunteers to work with us. Please contact the National office if you know anyone that may be interested.

The annual Mid-Year meeting of the Board of Directors brought with it a wealth of ideas that are sure to be valuable to your membership. The Board will be spending the upcoming months in a strategic planning mode and will focus its efforts on the **future**. The NAEPC Foundation is on the forefront of this plan and the Foundation Board & Committees will be hard at work developing public outreach programs centered around estate planning.

Finally, I would like to remind you that the NAEPC's 43rd Annual Conference has been moved to Amelia Island, FL due to Hurricane Katrina. We'll be back in New Orleans for the 2007 event and wish our members in New Orleans and the affected areas every success this year. Our thoughts and hearts are with you! Having just returned from Amelia Island I can tell you that the conference this year is going to be outstanding! The location is beautiful – complete with sandy beaches (that our group will enjoy during the social event), smart conference facilities and a speaker line-up that is sure to be one of the best ever!

We encourage you to call the NAEPC Office with any questions that arise during your leadership. Our website, www.naepc.org, is also available to you. Please take a few moments to review the information found there sometime soon.

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Don't miss the opportunity to attend the NAEPC's 43rd Annual Conference!

November 1 – 3, 2006

Amelia Island, FL

More conference information is available on page 2 of this newsletter!

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Upcoming Annual Conference Information

Due to the situation in New Orleans caused by Hurricane Katrina, the NAEPC Board of Directors made the extremely difficult decision to implement a change in the upcoming conference schedule. Please mark your calendar with the following dates:

43rd Annual Conference ~ November 1 – 3, 2006
Amelia Island, FL ~ Amelia Island Plantation

44th Annual Conference ~ October 31 – November 2, 2007
New Orleans, LA ~ Astor Crowne Plaza Hotel

NAEPC's 43rd Annual Conference

November 1 – 3, 2006

Amelia Island, FL ~ Amelia Island Plantation

The 3-day conference program features one day devoted solely to affiliated local council leadership development. As such, the Wednesday, November 1, 2006 **Council Leadership Day** schedule is geared toward information for leaders from the 170+ affiliated councils throughout the country. The remainder of the program is of a technical nature and will feature a talented collection of local and national speakers and will offer continuing education for Florida attorneys & insurance professionals, CFP's, CTFA's, CPA's and PACE credit.

The conference is located at the **Amelia Island Plantation** (www.aipfl.com). The hotel is a AAA-Four Diamond, 1350 acre property with four 18-hole championship golf courses & 23 clay tennis courts located just 30 miles North of Jacksonville. The Amelia Island Plantation also features a health and fitness center, award-winning youth programs, fine shops, a full service spa and excellent choices of dining options.

Amelia Island, FL is one of America's few remaining unspoiled island paradises and is the southernmost of the chain of Atlantic coast barrier islands that stretch from North Carolina to Florida. Its rich history, 13 miles of uncrowded beaches, lush, natural setting, moss-covered oaks, unparalleled golf, boating, and fishing, stunning sunrises and sunsets, and friendly "locals" make it more than just a place to visit.

Further information will be distributed via postal and e-mail as the conference approaches.

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!**



Sand dunes on Amelia Island at dusk

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MEMBER BENEFITS

Your Council's continued affiliation with the NAEPC makes it possible for your entire membership to take advantage of the exciting programs, services and discounts offered by the NAEPC. You are encouraged to inform your membership of the "Member Services" page online (http://www.naepc.org/member_services.web) as the programs are continually being expanded to include new opportunities.

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

Wealth Transfer Planning™ Estate Planning Software... Intelligent estate planning software

This complete estate planning drafting system (with expert system capabilities) offers a full complement of forms -- wills, revocable trusts, irrevocable trusts, strategic planning memos, powers of attorney, and more. While Federal in scope, state specific content is provided for all states (except Louisiana). The integrated "content help" is in a class by itself. From solo practitioners to large firms, WTP meets the demands of the most experienced estate planners. This state-of-the-art estate planning system authored by **Jonathan Blattmachr** and **Michael Graham** is fully networkable. With over 10% of the AmLaw200 now using WTP, it has become "the system of choice" for experienced trust & estate attorneys.

The NAEPC is the only organization currently receiving a discount on this product! Order today to receive \$1000 off on each license purchased!

Accredited Estate Planners (AEP), Estate Planning Law Specialists (EPLS) and members of affiliated local councils are entitled to a special discount on Wealth Transfer Planning™ Estate Planning Software. Contact [Nicole Splitter](mailto:Nicole.Splitter@naepc.org) at (888) 315-0872, Ext. 1 with questions. You can also visit www.ilsdocs.com for more information or to order online (enter promo code WTP-NAEPC06 when prompted).



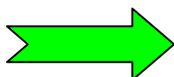
CCH, a Wolters Kluwer business, features an extensive line of research materials and software solutions that are the professional's first choice for reliable, practitioner-oriented guidance for advising clients and making critical business decisions.

CCH and NAEPC joined together to offer NAEPC members a **30% discount** on outstanding books on practitioner matters written by the leading experts.

NAEPC members also receive a **15% discount** on the powerful and versatile [CCH ViewPlan Advanced estate planning software](#) that allows you to quickly and easily generate easy-to-read graphs, reports and flowcharts that visually guide your clients through various planning scenarios – motivating them to take action.

[Learn more about these NAEPC-recommended titles](#) including:

- Estate and Retirement Planning Answer Book
- Asset Protection Strategies
- Estate Planning, 6th Edition
- Practical Guide to Estate Planning
- Multistate and Multinational Guide to Estate Planning



If you've had an experience – positive or negative – with one of the member benefit companies we want to hear about it! Please call the NAEPC office today to let us know.

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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

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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COUNCIL IN THE NEWS . . .

Mid-Missouri Estate Planning Council ~ *Columbia, Missouri*

This affiliated local council has recently designed and implemented a [scholarship program](#) in conjunction with the Dept. of Personal Financial Planning at the University of Missouri! The scholarship will be merit based, offered annually and awarded to a junior in the Personal Financial Planning degree program. The scholarship will also come equipped with a complimentary membership to the council and the recipient is expected to attend a limited number of meetings. The first recipient will be honored on Sunday, April 9, 2006! Contact Larry Fuller, Mid-Missouri EPC President, for more information – (573-214-4178).

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!

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

Council Relations Committee Update ~ *reach...inform...assist*

The NAEPC Council Relations Committee, under the direction of Lee Davis, has had a great start to the current year! Lee has expanded the committee to include many non-Board member volunteers and this group is working hard to reach **YOU** – our local leadership.

Additional volunteers are needed! Please contact either Lee Davis (lee@davislaw.net) or Eleanor Spuhler (eleanor@naepc.org) if you are interested in participating. The group meets for one hour via teleconference on the 4th Thursday of each month at 11:00 am Eastern Time. Each committee member is charged with helping to **reach** existing affiliated local councils, **inform** these groups about NAEPC programs & services and to **assist** in finding those organizations that are unaffiliated with the NAEPC.

Lee and his committee are also available for questions or concerns that arise along the way. Feel free to contact the NAEPC for the Council Relations Committee member nearest you.

Council Programs & Services

Website Options ~

The NAEPC has two upgraded website options available to assist you in running your Council. Whether you're looking for an online membership directory, a secured connection to receive event RSVP's or just a place to list your current Board, we have a site for you! Contact Kim Hronek (kim@naepc.org) for more information!

Leimberg Information Services ~

The NAEPC has an agreement with Steve Leimberg to utilize his online LISI service and your council has access to this program for \$16/member/year! Please contact Kim Hronek (kim@naepc.org) for more information or to set up a demonstration.

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