

**National Association of Estate Planners & Councils**  
*The Association of Choice for Estate Planning Professionals*

***AEP® ALERT – September 2010***

***A Word from the Chairperson***

Dear AEP® Designee:

The end of summer is here. Vacations are ending, schools are back in session, leaves will soon change colors (for some of you), estate planning councils are resuming meetings and life returns to a somewhat normal pace. The AEP® committee has not, however, taken a vacation. AEP® applications are coming in for processing from personal applications, council nominations and coursework completion. Also, thanks to all of you who promptly responded to your audit notification. This process enhances the image of our designation by verifying the educational and experiential components required to maintain it in active status and in good standing. As we continue our efforts to ensure the integrity and growth of our designation, I am pleased to welcome the following two new members to the AEP® Committee: Theodore L. Greenspan, JD, LL.M., AEP®, Mobile, AL, and Eido M. Walny, JD, EPLS, AEP®, Milwaukee, WI.

In addition to providing access to educational webinars, promotional materials and brochures, and exclusive referral opportunities through the “Find An Estate Planner” search engine on the NAEPC website and now on the public education website, [www.estateplanninganswers.org](http://www.estateplanninganswers.org), NAEPC is committed to providing “The Technical Corner” in each upcoming issue of the AEP® Alert, again adding value to your designation. This technically-oriented part of the newsletter will contain a brief article, written by active designation holders to assist fellow designees and add value to your practices. If you are interested in submitting an article for publication, please let us know.

For those of you who are “Linked in”, be sure to join the Group “AEP® Accredited Estate Planners”. We plan to make this Group a forum for discussion topics, interactive ideas to enhance the designation, and an efficient communication tool. You can quickly and easily request to join the Group exclusively for AEP® designees by clicking on this link  
[http://www.linkedin.com/groups?about=&gid=2024701&trk=anet\\_ug\\_grppro](http://www.linkedin.com/groups?about=&gid=2024701&trk=anet_ug_grppro).

In closing, we ask that as you encounter estate planning professionals whom you consider to be AEP® material, please encourage them to apply for the designation or submit their contact information to the NAEPC office and we will follow up with them. We will continue our efforts to be the association of choice for professionals engaged in the practice of estate planning. If you have any questions or ideas for improvement that you would like to share with us, please feel free to contact me or Susan Austin Carney, AEP® Designation Administrator, at 866.226.2224 or via email at [susan@naepc.org](mailto:susan@naepc.org).

Sincerely,

Greg

***Gregory E. Sellers, CPA, AEP®***  
***AEP® Committee Chairperson***

***Please join me in welcoming our newest designees:***

Dana R. Barrows, JD, CLU®, ChFC®, AEP®	Springfield, MA
Ronald B. Caballero, CLU®, AEP®	Waldorf, MD
Marcie W. duQuesnay, CPA, AEP®	Metairie, LA
Susan S. Fisher, CPA, CTFA, AEP®	Wilmington, DE
Gary W. Holmes, JD, AEP®	Hampton, NH
Robert A. Kokol, CFP®, CDFA, AEP®	Tampa, FL
Kelli S. Lewis, AM, CPA, AEP®	St. Louis, MO
Robert A. Matson, CLU®, ChFC®, AEP®	Millis, MA
William C. Mehaffey, CLU®, ChFC®, CLTC, AEP®	Metairie, LA
Morris J. Mizrahi, CLU®, AEP®	New York, NY
James M. O'Neil, Jr., JD, AEP®	Boston, MA
Suzanne D. Paulson, JD, AEP®	Birmingham, AL
Kenneth W. Price, CFP®, ChFC®, CLU®, AEP®	Cedar Park, TX
Howard M. Rosen, CPA, JD, AEP®	St. Louis, MO
Patricia J. Villano, CPA, AEP®	Closter, NJ
Mark H. Wander, CPA, PFS, ABV, CFF, AEP®	Marlton, NJ
Kerry C. Wangsgard, CTFA, AEP®	Ogden, UT
Jefferson A. Webster, MSFS, ChFC®, AEP®	Rochester, NY

**Mark Your Calendars Now for the 47<sup>th</sup> Annual Conference – Register Today to Receive the Early Bird Discount and Special Discount Pricing for First-Time AEP® Attendees and New Designation Holders!**

It's not too soon to begin planning for the NAEPC's 47<sup>th</sup> Annual Conference to be held from November 17 – 19 at the Hyatt Regency Mission Bay Spa & Marina in beautiful San Diego, California. Register today to receive both **the early bird discount (valid through September 30, 2010) and the special discount for first-time AEP® attendees and new designation holders awarded the designation after November 1, 2009**. Don't miss this excellent educational and networking opportunity where **you can earn all of your estate planning continuing education hours** necessary to maintain your designation in good standing. The [full registration brochure](#) is now available – register today!

**Looking for additional educational opportunities? Our Webinars are only a click of your mouse away! Please note that the September 8<sup>th</sup> and October 6<sup>th</sup> Webinars are free of charge!**

To register, visit <https://interactivelegal.webex.com> and enter your member discount code found below for the NAEPC member pricing of \$85 per session! These webinars qualify for your estate planning continuing education requirement so register today!

**September 8, 2010 – 1:00 pm – 2:00 pm ET**

**COMPLIMENTARY WEBINAR: A Systematic Approach to Building Quality Referrals with Jennifer Campbell Goddard, CEO, Integrity Marketing Solutions and Kyle E. Krull, Esq., President, Integrity Marketing Solutions**

There are so many marketing tools available to build your practice - from websites to workshop, billboards to blogs. But a marketing tool is not a marketing plan, and even a marketing plan is not always a system. Marketing expert Jennifer Campbell will show you how marketing should work, in a systematic way, to build a steady stream of quality referrals. Participants will learn the three-step marketing process that reduces client acquisition costs, cultivates a steady stream of referrals, and builds a practice that virtually runs itself; the one thing that most law firm websites lack, and why those websites don't result in new business for the firm; why your website should be integrated with social media, and why Linked-In is probably not working for you; and how to bring a systematic approach to your practice development efforts to get the most from your marketing investments.

**September 22, 2010, 1:00 pm – 2:00 pm ET**

**Key Estate Planning & Trust Issues in Uncertain Times with Al W. King, III, JD, LL.M., AEP® (Distinguished)**

Mr. King will address generation skipping trust planning with no GST tax, asset protection planning updates with discretionary trusts, possible SEC registration requirements for family offices and RIAs serving as trustees (including planning alternatives), state income tax updates for trusts, private family trust company updates and a reformation/modification and decanting update. **Discount Code sdtrust1**

**October 6, 2010 – 1:00 pm – 2:00 pm ET**

**COMPLIMENTARY WEBINAR: Social Media: Time Drain or Essential Strategy? with Jennifer Campbell Goddard, CEO, Integrity Marketing Solutions and Kyle E. Krull, Esq., President, Integrity Marketing Solutions**

Social media marketing is all the buzz this year. If you're not "liking" things on Facebook, "tweeting" on Twitter, or "blogging" your thoughts daily -- are you missing the boat? On the other hand, are these new media worth your time? If you write it, will they come? Is there anybody out there? You may be surprised at some of the answers you'll get from marketing experts Jennifer Campbell and Kyle Krull. Participants will learn why social media is an integral part of your practice development plan; how to leverage your time online and get the most for your efforts; the deadly sins you should never commit on social media; and how not marketing can build your practice and grow new referrals.

**Promote the AEP® Designation!**

You worked hard to obtain this professional designation and we ask that you help us to promote the designation by sharing your enthusiasm for the credential with your colleagues who may also be interested in applying for the AEP®. We welcome referrals and are happy to provide application qualifications and requirements to them. Also, designation requirements and qualifications along with a downloadable application form can be found at [http://www.naepc.org/aep\\_application.web](http://www.naepc.org/aep_application.web).

**We Need You!**

If you are interested in volunteering on one of the committees of the NAEPC, please let us know by contacting Susan Austin Carney, Designation Administrator, at 866.226.2224 or by email at [susan@naepc.org](mailto:susan@naepc.org).