

January / February 2017 Issue

National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter for affiliated local council officers ·

This monthly email is being sent to you as an officer or administrator for your NAEPC-affiliated local estate planning council, all officers on file with NAEPC receive the email. *NAEPC Minute* is an administrative report that does not take the place of *NAEPC News*, the official newsletter of the NAEPC, which is sent to the members of those councils that have approved access through the [Every Council Campaign](#). Past issues of *NAEPC News* can be found [HERE](#).

Please share this publication with your entire board at its next meeting or forward it via email if a meeting is not scheduled soon.

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JOIN THE COUNCIL LEADER GROUP ON LINKEDIN TODAY!

Click [HERE](#) or search for the “NAEPC Affiliated Local Council Leadership Group” in LinkedIn to join.

You must have a LinkedIn account to participate.



2017 Survey of Councils

We are excited to announce a survey intended to gather information about what your Estate Planning Council is doing and how you are doing it, so that we can better share those details with other councils from across the country. After all of the results have been collected we will be posting them on our website and believe that the information gathered will provide great insight and guidance for all of the councils affiliated with NAEPC.

We hope that one board member from your council will take a moment to complete the brief 9-question survey found at <https://www.surveymonkey.com/r/6T5TR7X> by March 17th.

Council Leadership Day 2016 – What Did You Miss?

Each year the NAEPC provides one full day of education and leadership sessions for the board, officers, and staff of our affiliated local councils - **Council Leadership Day**, held prior to the NAEPC Advanced Estate Planning Strategies Conference.

Attendees gathered in Arizona on November 16, 2016 to interact with fellow volunteer leaders, attend breakout sessions designed for idea sharing & growth, and learn about ongoing NAEPC programs and services available to the council and their membership.

Visit our [website](#) to see what you missed and start planning now to send your leadership to the [54th Annual NAEPC Advanced Estate Planning Strategies Conference](#), scheduled from November 15-17 in New Orleans, LA!

2017 Council of Excellence Application

It's official! The 2017 Council of Excellence Application is available online! [Visit our website](#) today to obtain your copy of the application, which is requested back by Friday, May 5th.

Webinars as Creative Programming

Tired of the same old meeting format?

Considering new programming ideas?

Trying to engage younger members?

Why not consider adding a webinar? Distance-learning programs are a great way to add a new event into the mix and to bring your EPC high-caliber speakers with very low cost. [The Robert G. Alexander Webinar Series](#) is available to councils for live or on-demand* group showings. Councils have reported offering the webinars as a regular part of their schedule, for special "meet up" brown bag events, and even as a free member benefit or special program for AEP® designees. Contact the NAEPC office today to learn more about your options and how group webinars can enhance your EPC!

**Programs can be shown at a date and time chosen by the council as long as it is at least 48 hours after the live broadcast.*



Member Benefits Recap

Members of your affiliated local council have access to a wide array of benefits at reduced or no cost. These offerings are a great way to build upon benefits your council is already offering with no additional work on behalf of your board! Please be sure to mention these valuable services at each council meeting, whether verbally or in print. Brochures are available that can be customized to your council or printed as-is, contact the national office for more details or for your copy. Click on the links below to browse the list by category, or see the [full list of opportunities](#).

- 🔗 [Marketing and Website Design Services](#)
- 🔗 [Educational Opportunities](#)
- 🔗 [Subscriptions and Publications](#)
- 🔗 [Programs and Services for Council Development](#)
- 🔗 [Software](#)
- 🔗 [Presentation Materials and Office Supplies](#)
- 🔗 [Complimentary Resources](#)
- 🔗 [Discipline-Specific Information](#)
- 🔗 [Other Benefits, Programs & Services](#)

Please remember... all members must utilize a user name/password to access detailed ordering links and information. If your council has a website hosted through NAEPC and utilizes passwords, members can use the "I forgot my password" option to access the benefits page that appears right on your website. Other

councils should contact NAEPC to obtain the appropriate user name and password combination for their council and must use the [national site](#) to access the benefits.

Staying Connected Via LinkedIn ·

NAEPC maintains a sub-group of the primary association group on LinkedIn, just for council leaders. Join today to interact with other council leaders from across the country, initiate and participate in council management-specific dialogue, and to receive regular posts from NAEPC! The sub-group is available only to current officers and directors of affiliated local estate planning councils. Click [HERE](#) to join (you must have a LinkedIn account to participate.)

Officer Update Form ·

All councils are encouraged to update NAEPC each and every time there is a change to the roster of officers. A fillable PDF file to do so can be found [online](#).

We are currently collecting a formation date for all Estate Planning Councils affiliated with NAEPC. Please take a moment today to email your council name and date of formation to eleonor@naepc.org. **Thank you!**

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The Association of Choice for Estate Planning Professionals