

January 2015

## National Association of Estate Planners & Councils Minute

### *...the monthly administrative report for affiliated local council leaders*

(This 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**. You are encouraged to share part or all of this publication with your entire membership. *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 online at <http://www.naepc.org/events/news>.)

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

#### **SPECIAL ALERT:**

Council dues notices were mailed in early January to the contact on record for your EPC. Please make sure to return your dues payment, service fees, and an officer update to NAEPC by March 27, 2015.

#### **IN THIS ISSUE**

- Taking Complete Advantage of Benefits Available to Your Council
- Council of Excellence Award Application Deadline Friday, April 3<sup>rd</sup>
- February 11, 2015 Webinar

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- Officer Update Form

#### **Benefits Available to Your Council ·**

Is your council taking full advantage of the benefits offered by your affiliation with NAEPC? Your low yearly dues offer access to programs for your council and its members alike! See below for clickable links to our most prominent benefits.

#### **Benefits for Members**

[Value Partners](#) (discounted programs & services)

[Webinars](#) at Value Pricing

Reduced Pricing to Attend the [Annual Conference](#) and Obtain Continuing Education Credit

Access to the [NAEPC Journal of Estate & Tax Planning](#)

#### **Benefits for Your Council**

Opportunity to Participate in the New [Council of Excellence Award](#) Program

[Council Nominated Accredited Estate Planner® Program](#)

[Council Leadership Day](#) at the Annual Conference

[Referral Lists, Sample Documents](#), Access to NAEPC Staff

[Speaker Resources](#) through the “No Charge” Speaker Program and Online Library

Webinars as [Group Programs](#)

Enrollment in the [Every Council Campaign Website Platforms](#) as Discount Pricing (fee applies)  
[Leimberg LISI Service](#) Council Program (fee applies)

Our national office is here to help make sure you are taking full advantage of these benefits. Call (866) 226-2224 to set up a 30-minute benefit refresher today!

### **Council of Excellence Award, Recognizing Achievement ·**

Created in 2014 and launched at the 51<sup>st</sup> Annual Conference, the National Association of Estate Planners & Councils Council of Excellence Award is designed to recognize those councils affiliated with the NAEPC that are positioned toward success. The program criteria were carefully developed with all council sizes in mind by a task force of council leaders, past presidents of NAEPC, and current board members.

The Council of Excellence Award is named for two individuals who truly sought to strengthen the bond between NAEPC and its affiliated councils during their terms on the board. Walter Lee Davis, Jr. served as president of the association in 2008 and was instrumental in forming the Council Relations Committee, a group of volunteer members who are charged with being a liaison between affiliates and the national association. Leonard H. Neiman served the association as a board member for over fifteen years. He worked tirelessly to gather information about estate planning councils from around the country, both affiliated and unaffiliated, and to make contact with their leadership to help explain the benefits of affiliating with NAEPC.

We are very excited to announce that the first awards will be offered in 2015 to councils in five categories – extra-small, small, medium, large, and extra-large. **Applications are due by Friday, April 3, 2015.** For full program criteria and a downloadable application, please click [HERE](#). Please direct questions to our national office at 866-226-2224 or [admin@naepc.org](mailto:admin@naepc.org).

### **February 11, 2015 Webinar ·**

**February 11, 2015** - 3:00 pm - 4:00 pm ET

**Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP® (Distinguished) - Littman Krooks LLP**  
**Sophisticated Drafting and Administration Issues for Special Needs Trusts**

Special Needs Trusts are often an important component of an estate plan for an individual with special needs and his or her family. Knowing which type of Special Needs Trust (SNT) to utilize is only part of the solution. In this webinar, Bernard A. Krooks will review the drafting issues you will need to consider in order to ensure that the SNT offers the greatest amount of protection and the most flexibility for the intended beneficiary. In addition, Mr. Krooks will review significant issues which arise during the administration of many SNTs. These issues, if not properly addressed, can result in the loss or reduction of public benefits for the beneficiary.

Bernard A. Krooks is a founding partner of the law firm Littman Krooks LLP, chair of its elder law and special needs department, and is a nationally-recognized expert in all aspects of elder law and special needs planning. He is past president of the Special Needs Alliance, a national, invitation-only, not-for-profit organization dedicated to assisting families with special needs planning. Mr. Krooks is past president and fellow of the National Academy of Elder Law Attorneys, past chair of its tax section and past editor-in-chief of NAELA News, as well as a founding member and past president of its New York

chapter and in 2008 received the chapter's Outstanding Achievement Award for his lifelong work on behalf of seniors and those with disabilities. Krooks is past chair of the elder law section of the New York State Bar Association and past editor-in-chief of its newsletter, the Elder Law Attorney. He is also a member of the trusts and estates law and tax sections of the New York State Bar Association and co-authored the chapter entitled "Creative Advocacy in Guardianship Settings: Medicaid and Estate Planning, Including Transfer of Assets, Supplemental Needs Trusts & Protection of Disabled Family Members" of its publication Guardianship Practice in New York State and its publication Elder Law, Special Needs Planning and Will Drafting. He serves on the editorial boards of Exceptional Parent Magazine, Trusts & Estates magazine, and Leimberg Information Services. Krooks, a sought-after expert on elder law, special needs planning and estate planning matters, has been quoted in many national publications, has presented at national educational conferences, has testified before the United States House of Representatives and the New York City Council on long-term care issues, and has appeared on many radio and national television programs. Krooks is past president of the Estate Planning Council of Westchester, serves on the advisory board of The NAEPC Education Foundation, and is a member of the New York City and Hudson Valley Estate Planning Councils.

[REGISTER HERE](#)

#### Continuing Education Credit

Continuing education credit will be available at each webinar for Accredited Estate Planner® designees. In addition, a certificate of completion will be made available for those professionals who feel the program satisfies their continuing education requirements and are able to self-file. Councils may also file the program in their home state for programs offered in a group setting.

#### Registration Fees

\$40 / Accredited Estate Planner® designee (dues must be current at the time of registration)

\$60 / member of an affiliated local estate planning council or at-large member of NAEPC

\$100 / individual non-member

\$250 / council meeting or group gathering (council dues must be current at the time of registration)



#### Best Practice Tidbit ·

Is your council struggling to create a budget? We can help! A sample and downloadable budget, formulas included, is available by clicking [HERE](#).

Looking for additional best practices and tidbits? Visit the "Referral Lists" page of the website built just for you council leaders! Looking for guidance on a particular issue? Please contact our national office – we stand ready to assist.

#### Member Benefits, Programs & Services Recap ·

Members of the National Association of Estate Planners & Councils and members of your affiliated local council have access to a wide array of benefits, programs & services 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 benefits 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.

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.

### **Existing Benefits**

ABA Book Publishing / The ABA Checklist for Family Heirs...  
Acquire Direct Marketing  
American Bar Association Paralegal Program  
American Dream Planner LLC  
Amicus Creative Media & Legal Vault  
BizActions LLC  
Business Valuation Resources, LLC  
Cards for a Cure  
Charitable Planning Desk Reference for Advisors / Strategic Philanthropy  
Cloudia Assistant  
CrummeyService  
Discuss Directives, LLC - Heart2Heart Workbook & Deck of Cards  
DocuBank  
EstateAssist  
Estate Planning Smarts / Pensworth  
EstatePlanningBinders.com  
Family Business Magazine  
Family Wealth Map  
Fiserv Investment Services  
Florida Domicile Handbook  
International Association of StoryKeepers (I-ASK)  
International Genealogical Search Inc.  
Klark Proposal Software  
Konica Minolta Business Solutions  
Lawgic, LLC  
LegacyQuest, LLC  
Legal Binders Now (LBN)  
My Perfect Will  
My Personal DataSafe LLC  
NationalUnderwriter.com  
Oswald Companies Personal Excess Liability  
Ruby Receptionists  
Sterling Cut Glass  
The Ultimate Estate Planner

Trusts & Estates  
Veracity - MTG  
Washington Institute for Graduate Studies  
WealthManagement.com  
Wolters Kluwer Law & Business

**LinkedIn Sub-group for Council Leaders ·**

NAEPC has launched a sub-group of the general association group on LinkedIn, just for council leaders. Join today to interact with other council leaders from across the country and to receive weekly posts from NAEPC! The sub-group is available only to officers and directors of affiliated local estate planning councils. See you there ~

**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 at [http://www.naepc.org/assets/national/pdf/council\\_officer\\_form.pdf](http://www.naepc.org/assets/national/pdf/council_officer_form.pdf).

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*The Association of Choice for Estate Planning Professionals*