

February / March 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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Regional Leadership Day – NEW in 2017!

Learn Best Practices - Celebrate Success - Discuss Topics of Interest - Gather New Ideas

Regional Council Leadership Day is designed to be a learning and sharing experience for volunteer board members and council executives from estate planning councils within the same geographic region. Designed similarly to Council Leadership Day, which is held each year at the annual conference, the day of programming will offer a “hot topic” session followed by a networking luncheon and a leadership sharing session. Each council within a reasonable drive of a host city is encouraged to send several officers and the council executive. Events are planned as follows:

Monday, April 24, 2017 – Wilmington, DE
Wednesday, April 26, 2017 – Columbus, OH
Friday, April 28, 2017 – Orlando, FL

For more information about these exciting events or to download the registration form, please click [HERE](#).

2017 Council of Excellence Application

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.

Call for Volunteers

The Council Relations Committee is looking for additional volunteers! Are you interested in serving as the conduit between the councils in your territory and NAEPC, assisting with affiliated local council retention and growth, and helping councils become stronger and more versed in the benefits, programs & services provided through their affiliation? If so, we want to hear from you!

The committee typically meets on the 4th Thursday of each month at 11:00 am ET for 30 minutes. Additional outreach may also be requested several times through the year.

Volunteers are sought in or near the following states*:

AK	FL	KY	NC	OR	UT
AL	GA	MA	ND	PA	WA
AZ	ID	MI	NV	RI	WI
CA	IN	MN	NY	SC	WV
CT	KS	MO	OH	SD	

Interested parties can download a committee volunteer application [HERE](#). Please return it to the national office at your convenience.

**final assignments may vary based on the territory structure and available volunteers*

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.**



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.

New Benefits!

AICPA Engage - June 12-15,2017 - MGM Grand Las Vegas, NV | Online Broadcast



The AICPA Advanced Estate Planning and Personal Financial Planning Conferences join AICPA ENGAGE this June. Experience four days of fresh ideas and breakthrough presentations — all under one roof.

Bring the greatest value to your clients by becoming the most trusted resource for navigating shifts and changes in the global economy. Immersed in four days of leading-edge best practices and ideas from esteemed thought leaders in financial planning and estate planning, you'll learn why past attendees rave about this conference every year.

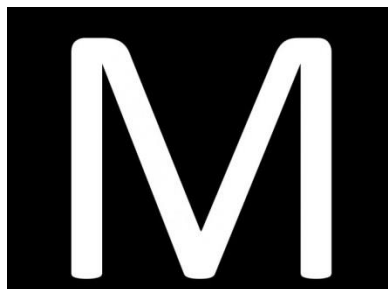
Choose among five tracks for focused learning: Insurance and Risk Management, Investment Management, Practice Management and Technology, Wealth Management and Tax, and Retirement Planning. You'll refine business strategies, implement new techniques, and learn a holistic approach to every life stage affecting your client's financial outlook

Learn more and register by clicking [HERE](#). NAEPC members are entitled to take advantage of a \$100 discount by using code "100ENG17" at checkout.

M Brands Film, Inc. (M)

Watch the M welcome video [HERE](#).

Do you have **website video**? If not, you are turning away 90% of your prospects and clients. Video connects you to pain points, education, support, and retention throughout their wealth preservation journey.



Through a value partner arrangement with NAEPC, M is offering video production services at a **20% discount** to members. Through the web, M creates explainer video for your website, social media, and communications. In 45 minutes, M makes the shyest professional shine with sincerity without breaking your budget, interrupting operations, or making a cartoon out of your business. Plus, we offer your clients legacy videos for their loved ones.

With 3,000 videos on mbrands.co, **we're ready to shoot yours**. Ping M (loyalty@mbrands.co) or ring (415.404.9276) to set up a free video assessment of your website and important estate work.

To learn more about the M process, click [HERE](#).

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