February 2014

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 on record** or **administrator** for your NAEPC-affiliated local estate planning council, all officers on file 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.

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2014 Dues Notices Mailed ~

Dues notices were mailed early January, along with a request for an officer update! Please take some time to complete and return yearly dues and optional service fees by April 4, 2014. Please also make sure to return an officer update form (found HERE) to ensure that we are communicating with the most current officers for your affiliated local council.

The start of the year is also a great time to review your participation with NAEPC.

- Is your council in need of a website?
- Are you participating in the Every Council Campaign so that we can reach your members with NAEPC News, which provides a recap of all of the benefits, programs, and services available to council members?
- Has your council considered providing your members the valuable benefit of the Leimberg LISI Service, provided by NAEPC at a greatly reduced per-member fee?
- Are your members aware of the 30+ value partners that provide all members of affiliated local councils with benefits and services at greatly reduced fees?

If the questions above have you interested, we are here to help! Follow the hyperlinks in the text above or call the NAEPC office for more information.

February 12, 2014 Webinar ~

Information about the next webinar in the Robert G. Alexander Webinar Series has been provided below; please consider copying and pasting the text into a new email for your entire membership. Those councils that utilize a website platform hosted by NAEPC can now forward the webinar (appearing in your calendar as a national event) the same way council events are forwarded – take a look today!

February 12, 2014
3:00 pm - 4:00 pm ET

"**How Collaborative Teams Work and Why They Are Essential For High Net Worth Clients**"

Expertise offered by:
Albert E. Gibbons, CLU®, ChFC®, AEP® (Distinguished) / AEG Financial Services
Program moderated by Paul S. Viren, CLU®, ChFC®, AEP®

About the program:
The more complex the wealth, the more sophistication is required of each advisor. It is not possible for one individual or even one firm to have the ability and skill to advise regarding investments, taxes, wealth transfer, business succession, risk management, family wealth issues, valuations, philanthropic strategies and the interrelationship between them all. This presentation will focus on how to form and focus superb estate planning teams that will serve the best interests of clients.

About the speaker:
Al Gibbons specializes in estate planning and life insurance planning for high net worth individuals, high-level corporate executives, and successful entrepreneurs. He works closely with professional tax advisors (attorneys, accountants, and trust officers) designing and implementing sophisticated life insurance strategies to help solve their clients' unique estate protection needs. Creator of The 80/20 Estate Plan™, Al Gibbons' expertise emphasizes an effective estate planning process that results in clients taking action and achieving the desired results. A talented thinker, speaker, and writer, he has achieved a national reputation and is sought after to explain what he does and why it is so effective. He is a Life Member of the Million Dollar Round Table and the prestigious Top of the Table. Al is an active member of the Forum 400, the Association for Advanced Life Underwriting, and Philadelphia Estate Planning Council.

This program is suitable for all levels of knowledge.

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 that 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 Fee
• $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)

Upcoming Programs
The full list of upcoming programs can be found at http://www.naepc.org/events/webinar.

Stelter's 2013 Insight Report - Metrics That Matter: Links between Advisors, Donors and Nonprofits ~
This study examines the behaviors, attitudes and characteristics of professional advisors who interact with the public and nonprofits on the topics of estate planning and planned giving. Our goal was to better understand the dynamic between advisors, their clients and nonprofits to shed light on ways in which fundraisers can rethink conventional approaches and build stronger relationships.

The learning objectives included:

- To provide a baseline description of the professional advisor population upon which further inquiry can build
- To better understand the relationships between advisors, their clients and nonprofit planned giving professionals
- To more specifically understand how nonprofits and advisors interact when it comes to charitable decisions
- To identify barriers to planned giving and opportunities for greater synergy between advisors and nonprofits

The findings in this report are based on a survey of 657 AEP® (Accredited Estate Planner®) designees conducted by Selzer & Company, Inc.   Download your copy of the report HERE.

Where Was NAEPC in 2013 (and Why Were We There?) ~

NAEPC is active in the estate planning community each year by having a presence at various national events.   The association exhibited at the following conferences during 2013:

AICPA Personal Financial Planning Conference, January, Las Vegas
WealthCounsel Planning for the Generations Symposium, July, Denver
Society of Financial Service Professionals Clinic, August, Philadelphia

Each conference offers an opportunity to promote the value of membership in an affiliated local estate planning council, to offer information about NAEPC-administered designation programs, and to remind the members of the affiliated local estate planning councils of the benefits, programs and services available to them through the council's continued affiliation with NAEPC. WE WANT TO HEAR FROM YOU! If you have gained a new member or received feedback from a member that attended an event where NAEPC was present, please call Eleanor M. Spuhler at the national office with your report.

51st Annual Conference ~

What is Council Leadership Day & Why Should Our Council Send a Representative? ~

Each year, in conjunction with the annual conference, the NAEPC provides one full day of education and leadership sessions just for the board / officers of its affiliated local councils; this event is called Council Leadership Day. NAEPC recommends that at least one officer at the vice-president level or below attend along with the council's staff member.

The morning is dedicated to the annual meetings and informative updates from both NAEPC and The NAEPC Education Foundation, while afternoon sessions are committed to leadership development. The attendee can expect 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. The majority of this day is dedicated to open roundtable discussions with leaders of councils of like size facilitated by volunteers who are also board members from their home council.

With nearly 50% of all councils represented by an attendee at the annual conference, Council Leadership Day attendees can expect to return to their home councils with:

- ideas for membership growth and retention
- an understanding of the challenges other councils are facing and how to combat them
- cutting-edge initiatives
- ways to increase non-dues revenue

- a perspective on what similarly sized and operated councils are doing on a daily basis
- information on how NAEPC can assist the council

It is NAEPC's belief that an important part of leadership development lies within council staff. As such, paid administrators are encouraged to attend Council Leadership Day and may do so with the registration fee waived. Doing so allows the most constant presence for your council to learn about NAEPC and its benefits, programs, and services (and to communicate these details with your board and membership), and offers a special learning track – making them all the more valuable to your organization! If your council employs a professional administrator, we encourage you to make plans for that person to attend the 50th Annual Conference!

Want to see what you missed in 2013? Click HERE for more information.

Please remember, the annual conference is not just for leaders! Your entire membership can take advantage of two full days of technical education and continuing education credit. Additional information will be available soon!

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 range of benefits, programs & services at reduced or no cost. These benefits 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.

· Benefits for Members of Affiliated Local Estate Planning Councils ·

2-Part Webinar Series with Robert S. Keebler - Planning After the DOMA Decision
Acquire Seminar Marketing
Advisys Back Room Technician
AfterSteps
American Dream Planner Software
Amicus Creative Media
BizActions enewsletters for practioners
BVR's Guide to Business Valuation Issues in Estate & Gift Tax edited by Linda Trugman, CPA/ABV, CBA, ASA, MBA
BVR's Training Packs - Webinar recordings & transcripts
CBData Software to Simplify Your Life
CrummeyService, America's Leading ILIT Software Company
DocuBank: Emergency Access to Vital Documents
Estate Planning Smarts, A Practical, User-Friendly, Action-Oriented Guide, By Deborah L. Jacobs
EstatePlanningBinders.com
Family Business Magazine
Fiserv Investment Services
Florida Domicile Handbook: Vital Information for New Florida Residents
Heart2Hearts: Workbook and Deck of Cards
International Genealogical Search Inc.
Klark Proposal Software
Konica Minolta Business Solutions
Lawgic, LLC
LegacyQuest, LLC
Legal Binder Now (LBN)
LegalVault - Revolutionizing Attorney Document Storage
My Perfect Will
My Personal DataSafe LLC, the Nation's Most Comprehensive System for Sharing and Managing Client Information

Oswald Companies Personal Excess Liability
Private Wealth Magazine Subscription
Ruby Receptionists
The ABA Checklist for Family Heirs: A Guide to Family History, Financial Plans and Final Wishes
Sterling Cut Glass
The Charitable Planning Desk Reference for Advisors
The National Underwriter Company
The Ultimate Estate Planner, Inc.
Trusts & Estates Magazine
Wall Street-themed Greeting Cards
WealthManagement.com
Wolters Kluwer Law & Business

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.

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.

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