

February 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.**

*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 the next council board meeting or forward it via email if a meeting is not scheduled soon.**

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### Message from the President ·

If you ask each member of your council Board of Directors to define *leadership*, you will probably get 10 variations on the theme. Although the term can mean different things to different people, there is usually a common thread that most can agree on – effective leadership is the ability to bring the future to the present by creating a vision and motivating people along the way to achieve a common goal. In the case of your estate planning council, the goals will be driven by the mission and vision statements. Which brings me to my point – have you taken stock of your council's activities and are there things your council leadership can provide to its members to make them the best they can be? Below are a few suggestions to consider.

- Encourage members to serve on a committee. This will engage them beyond merely attending monthly meetings and provide a pool for selecting future board members.
- Encourage current and past board members to get involved at the national level by serving on one of NAEPC's various committees.
- Don't be so technical. Hold networking and social events which allow members to mingle and meet others that can be helpful to their practice.
- Ask your speakers to promote the benefit of multi-disciplinary teaming as part of their presentation. Consider an entire program on the topic using a panel of representatives from the various professions within your council.
- Promote the Accredited Estate Planner® designation to let those qualified candidates distinguish themselves within their profession and in the community.

- Participate in National Estate Planning Awareness Week or create a community outreach program to better connect with the community that your members serve.
- Connect with local colleges and universities (and even high schools). Invite instructors, department heads and students to your meetings and maybe even create a mentor and/or scholarship program for students that want to pursue careers in estate planning related fields.

Many of these ideas have been successfully implemented by councils across the country with great success. To further encourage our member councils to become the best they can be, NAEPC has established the Council of Excellence Award which recognizes those councils that have gone beyond being a mere membership organization and have created the best opportunities for success for their members and the community in which they exist. For further information and to apply for this award which will be presented (by council size) at the 52<sup>nd</sup> Annual Conference in Amelia Island, Florida (November 18-20, 2015), please visit our website at [www.NAEPC.org](http://www.NAEPC.org).



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

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 weekly information 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.)

#### **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.

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).

#### **March 18, 2015 Webinar ·**

March 18, 2015 - 3:00 pm ET

John J. Scroggin, JD, LL.M., AEP® - Scroggin & Company, P.C.

Basis Planning

For decades the primary tax focus of estate planning has been in the minimization of transfer tax costs. For over 99% of Americans, the passage of ATRA shifted the tax focus of estate planning to income tax planning and tax basis planning. Jeff Scroggin will discuss some of the practical traps and opportunities in planning for the basis of assets; including pre-mortem basis planning, planning for loss assets and why many of the previous techniques clients previously adopted have pivoted 180 degrees.

John J. (“Jeff”) Scroggin has practiced as a business, tax and estate planning attorney in Atlanta for 36 years. Jeff serves as a member of the board of directors of the University of Florida College of Law and

as a founding trustee of the University of Florida College of Law Tax Institute. Jeff served on the board of directors of the NAEPC from 2002 to 2010 and was founding editor of the NAEPC Journal of Estate and Tax Planning from 2006-2011. He was co-editor of CCH's Practical Estate Planning from 2004 to 2006. Jeff is the author of over 250 published articles, white papers and books. Jeff has been quoted extensively, including 8 times in the Wall Street Journal, on CHH Headline, National Public Radio, the New York Times, Fortune, Forbes, Kiplinger's, Money, the International Herald Tribune, the Chicago Tribune, The South China Post, The LA Times, Newsday, and the Miami Herald. [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. **It is the responsibility of the attendee to determine whether their state, discipline, or designation will allow one to self-file for a distance-learning program.** 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 ·

Member recognition is an important part of council operation. Is your council actively recognizing its Accredited Estate Planner® designees? If not, view our handy resource guide, which 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**

- [Acquire Seminar Marketing](#)
- [American Bar Association Paralegal Program](#)
- [Amicus Creative Media](#)
- [BVR's Guide to Business Valuation Issues in Estate & Gift Tax edited by Linda Trugman, CPA/ABV, CBA, ASA, MBA](#)
- [Charitable Planning Desk Reference for Advisors offered by Strategic Philanthropy](#)
- [Cloudia Assistant](#)
- [CrummeyService, America's Leading ILIT Software Company](#)
- [DocuBank: Emergency Access to Vital Documents](#)
- [Estate Assist](#)
- [Estate Planning Smarts, A Practical, User-Friendly, Action-Oriented Guide, By Deborah L. Jacobs](#)
- [EstatePlanningBinders.com](#)
- [Family Business Magazine](#)
- [Family Wealth Map](#)
- [Florida Domicile Handbook: Vital Information for New Florida Residents](#)
- [Heart2Hearts: Workbook and Deck of Cards, Discuss Directives, LLC](#)
- [International Genealogical Search Inc.](#)
- [International Association of StoryKeepers \(I-ASK\)](#)
- [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](#)
- [NAEPC Journal of Estate & Tax Planning](#)
- [NationalUnderwriter.com](#)
- [Oswald Companies Personal Excess Liability](#)
- [Ruby Receptionists](#)
- [The ABA Checklist for Family Heirs: A Guide to Family History, Financial Plans and Final Wishes](#)
- [Sterling Cut Glass](#)
- [The Ultimate Estate Planner, Inc.](#)
- [Trusts & Estates Magazine](#)
- [Veracity ♦ MTG \(payment processing solutions\)](#)
- [Washington Institute for Graduate Studies](#)
- [WealthManagement.com](#)
- [Wolters Kluwer Law & Business](#)

### **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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