

February 2016 Issue

National Association of Estate Planners & Councils Minute

· the monthly administrative report 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.

Dues notices have been mailed! Please complete and return your dues & service orders and an [officer update](#) by March 25, 2016. Please take special care to complete the sections requesting the council formation date and percentage of membership by discipline. Thank you!

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Message from the Chair



On behalf of the entire Council Relations Committee, I wish to thank Paul Viren for his dedicated years of service as the chair and co-chair of the committee charged with serving the estate planning councils affiliated with NAEPC. We welcome current committee member, Michael Panebianco (NH), as he assumes the role of co-chair for 2016. Michael will work closely with John Meyer on the Walter Lee Davis, Jr. & Leonard H. Neiman Council of Excellence Award, among other projects.

As we ended 2015 and began 2016, we gratefully welcomed several new committee members, including: Jerry Coats (AR); Josh Didion (OH); Judy Saxe (MA); Timothy Nolte (VA); and Ken Nopar (IL). It is great to have new members every year to help us remain connected to the councils we serve. If you are interested in volunteering for NAEPC, please visit our [website](#).

Finally, we had an amazing 2015 with the recognition of the five inaugural Walter Lee Davis, Jr. & Leonard H. Neiman Council of Excellence Award winners and several "Five Star" councils at the Annual Meeting held on November 18th. In addition, we were able to welcome **eleven** new councils to membership during 2015, which brings our total membership to nearly 265 affiliated councils!

Kit MacNee, CFP®, CRPC®, AEP®, CSPG (CA)

March 9, 2016 Webinar

3:00pm - 4:00pm ET (attend live or on-demand)
Life Insurance as an Asset Class
Richard M. Weber, MBA, CLU®, AEP® (Distinguished)

Life Insurance as an Asset Class (LIAC) contextualizes life insurance within the principles of financial planning. Starting with risk tolerance to direct the client's attention to selecting appropriate policy styles, LIAC then positions those policies into the fixed-return portion of a client's portfolio of diversified assets. This is an intermediate program.

Richard M. Weber, MBA, CLU®, AEP® (Distinguished) is a NAEPC Estate Planning Hall of Fame® entrant and former national president of the Society of Financial Service Professionals. A 48-year veteran of the insurance industry, he has been an agent, insurance carrier executive, and for the last 20 years a fee-only insurance consultant working with businesses and ultra-high net worth individuals and families.

[REGISTER HERE](#) for the individual program. To register for the 2016 series, please click [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.**

Registration Fees

- \$40 / Accredited Estate Planner® designee
- \$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

The Robert G. Alexander Webinar Series was launched in September 2013 to provide estate planners with accessible, high quality, multi-disciplinary education. Programs are available live and on-demand to individuals and to be used as group gatherings where EPC members view the program together in a single location. New in 2016, we are excited to announce yearly subscription rates that provide access to all programs during the calendar year. For the full schedule of national presenters, information about both individual and subscription rates, and an archive of prior programs, please click [HERE](#). Why not consider adding a webinar to your schedule as a new and creative program?



53rd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders ·

EDUCATION & COLLABORATION
Save-the-Date! November 16-18, 2016
Phoenix / Scottsdale, Arizona

The NAEPC Advanced Estate Planning Strategies Conference is open to every member of your estate planning council and provides:

- Multi-disciplinary content provided by nationally-known presenters
- Nationwide, Multi-disciplinary Continuing education credit (up to 15 hours, individual states determine the total number of hours awarded)
- Networking with estate planners from around the country in a collegiate environment

The program includes one day for leaders of estate planning councils ([Council Leadership Day](#), Wednesday, November 16th) and two full days of continuing education for every estate planning professional and discipline (Thursday, November 17th & Friday, November 18th).

Download the "Save the Date" brochure [here](#)! Registration opens April 2016!

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.

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.

New Benefits

- [Everything But the House](#), an estate sale marketplace
- [Everplans](#), a life and legacy platform that helps you and your clients gather all of the important information, documents and wishes
- [Yourefolio, Inc.](#), an advisor driven software focusing on estate and legacy planning
- [Merrill Anderson Company](#), creating compelling, inexpensive financial and estate planning communications for 80+ years

Existing Benefits

- [Acquire Seminar Marketing](#)
- [Ahrens Technologies, LLC](#)
- [American Bar Association Paralegal Program](#)
- [Amicus Creative Media](#)
- [Bloomberg BNA's Art of the Estate Tax Return by Keith Schiller](#)
- [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](#)
- [International Association of StoryKeepers \(I-ASK\)](#)
- [Klark Proposal Software](#)
- [Konica Minolta Business Solutions](#)
- [Lawgic, LLC](#)
- [LegacyQuest, LLC](#)
- [Legal Binder Now \(LBN\)](#)
- [Legal Directives, LLC](#)
- [LegalVault - Revolutionizing Attorney Document Storage](#)
- [My Perfect Will](#)
- [My Personal DataSafe LLC, the Nation's Most Comprehensive System for Sharing and Managing Client Information](#)

- [Software Company](#)
- [Disinherit the IRS](#)
- [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](#)
- [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.](#)
- [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 LastingMatters Organizer](#)
- [The Ultimate Estate Planner, Inc.](#)
- [Trusts & Estates Magazine](#)
- [Veracity - MTG \(payment processing solutions\)](#)
- [Washington Institute for Graduate Studies](#)
- [WealthManagement.com](#)
- [Wolters Kluwer Law & Business](#)

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