

February 2018 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 council executive 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 contact the national office if you have questions about your council's status within the Every Council Campaign.

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 16, 2018. Thank you!

HIGHLIGHTS

- Regional Leadership Day Dates Announced for June 2018 – California & Washington
- LINK Online Training Course: Advanced Education in Multi-Disciplinary Teaming
- Year-End Survey

IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference – November 6 - 9, 2018
- Upcoming Webinar & Using Webinars as Creative Programming
- Benefits Available to Members of Your Council
- Officer Update Form
- Council Leadership Group on LinkedIn

Scan this message for [HOT TOPICS]!

Regional Leadership Day

[HOT TOPIC] We are hard at work planning the 2018 Regional Leadership Day programs and welcome your leadership to join us on Tuesday, June 19th in Anaheim, CA, Thursday, June 21st in San Francisco, CA or Monday, June 25th in Seattle/Tacoma. All councils within a reasonable distance of these cities are encouraged to send multiple board members and those from outside of the immediate area are also welcome to attend; a block of rooms will be available for those in need of overnight accommodations.

Registration will be open soon! >[Learn more about Regional Leadership Day](#) or [Read the notes from the 2017 Regional Leadership Day and Council Leadership Day conferences](#)

LINK Online Training Course: Advanced Education in Multi-Disciplinary Teaming

We are excited to announce our newest member benefit – the LINK online training course in collaboration! Launched in conjunction with The Legacy Companies, LINK provides easy and on-demand access to advanced education built around our core value, the team approach to estate planning. **[HOT TOPIC]** LINK was specifically designed and developed for the needs of council members and is provided at a special price that no other group will receive. Enrollment in this fun and interactive self-paced course is available to Accredited Estate Planner® designees for just \$100* and estate planning council members for \$169. > [Learn more about LINK](#) or [Watch the program introduction](#)

The help of your board of directors in making sure your membership is aware of this new benefit is appreciated!

**Sign in to the AEP Login area of www.NAEP.org or contact the NAEP office to obtain the AEP® discount code.*

2017 Survey of Councils

We request your input on a survey intended to gather information about your council's favorite speakers and topics from 2017, what your Estate Planning Council is doing, and how you are doing it, so that we can share those details with other councils. After 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 NAEP. **[HOT TOPIC]** We ask one board member from your council to take a moment to complete the brief 9-question survey found at <https://www.surveymonkey.com/r/6T5TR7X> by **March 16th**.



55th Annual NAEP Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION

The [55th Annual NAEP Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders](#) is scheduled from November 6 – 9, 2018 in Ft. Lauderdale and it's never too early to plan to attend and to start sharing details about the conference with the members of your council. The program will provide two and one-half days of continuing education credit for the various estate planning disciplines and create an opportunity for your members to develop valuable relationships with professionals from across the country. Within the next two months the contact on record for your council will receive a supply of early bird conference brochures. Please share this information and encourage your members to attend through email and in person at meetings and events.

We hope that your council will send multiple executive committee members to Council Leadership Day on Tuesday, November 6th along with your council's executive. Much like the rest of the conference, this day of events is an all-new redesigned schedule with plenty of time to meet with and learn from other councils, as well as the leadership of NAEP. > [Learn more about Council Leadership Day](#)

Speakers will be announced soon and registration opens in April!

Robert G. Alexander Webinar Series & Using Webinars as Creative Programming ·

The Robert G. Alexander Webinar Series provides councils and their members with accessible, affordable, multi-disciplinary education. Programs are available live and on-demand to watch at your leisure and attendees can choose to register for individual programs or for a series subscription. Councils can also register for a group gathering, which provides one feed to be shown to a group gathered together in a single location.

Upcoming Program > [For more details and to register online](#)

Wednesday, March 14, 2018 · High Tax Free Compounded Returns: The Keys to Building Wealth and Accomplishing Great Financial Planning with Jonathan G. Blattmachr, Esq., AEP® (Distinguished) and Jeff Glickman

| Registration Fees | Individual | Series |
|--------------------------|------------|--------|
|--------------------------|------------|--------|

| | | |
|--|-------|---------|
| Accredited Estate Planner® Designee | \$40 | \$280 |
| Junior / Student (Junior or Student member of an affiliated EPC or one who is in the process of attaining the AEP® designation by virtue of being enrolled in a required or elective course at The American College) | \$40 | \$280 |
| Member of Affiliated Estate Planning Council / At-Large Member of NAEPC | \$60 | \$420 |
| Non-Member | \$100 | \$700 |
| Group Gathering (one feed shown in a single location to a group, additional feeds available for \$25) | \$250 | \$1,125 |

Continuing education credit is available at each NAEPC-hosted webinar for Accredited Estate Planner® designees. In addition, a general 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.

[HOT TOPIC] *Tired of the same old meeting format? Considering new programming ideas? Trying to engage younger members? As you create your programming schedule, why not consider adding a webinar or two? Programming is consistently noted as a key component to member satisfaction, growth, and retention and distance-learning programs are a great way to bring your EPC high-caliber speakers with little or no cost. Councils have reported offering the webinars as a regular part of their schedule, for special “meet up” brown bag events, and even as a free member benefit or special program for AEP® designees. Contact the NAEPC office today to learn more about your options and how group webinars can enhance your EPC! All councils can receive one complimentary webinar each calendar year!*

Member Benefits ·

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 every council meeting, whether verbally or in print, and within postal mailings. **Brochures are available that can be customized to your council or printed as-is, contact the national office for more details or see a sample [HERE](#).**

Click on the links below to browse the list of all by category, or see the [full list of opportunities](#).

- [NAEPC-Provided Benefits](#)
- [Educational Opportunities](#) – **[HOT TOPIC] New offerings this month!** *Discounts to 3 American Law Institute Continuing Legal Education Programs: Estate Planning in Depth 2018; Planning Techniques for Large Estates 2018; and Representing Estate and Trust Beneficiaries and Fiduciaries 2018*
- [Marketing and Website Design Services](#)
- [Presentation Materials and Office Supplies](#)
- [Software](#)
- [Subscriptions and Publications](#)
- [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.

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](#).

Staying Connected Via LinkedIn ·

Does your council want to ask other councils for advice? Looking for ideas for programming?

NAEPC maintains a group on LinkedIn just for council leaders. Join today to connect with council leaders from across the country and to initiate and participate in council management-specific dialogue! The group is available to current officers and directors of affiliated local estate planning councils. Click [HERE](#) to join (you must have a LinkedIn account to participate.)

National Association of Estate Planners & Councils

1120 Chester Ave., Ste. 470

Cleveland, OH 44114

(866) 226-2224 - fax (216) 696-2582

admin@naepc.org

The Association of Choice for Estate Planning Professionals