March 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.

NAEPC would like to welcome Bridget Troy, the newest member of our team! Bridget will be handling many council relations efforts, including the website platforms and Leimberg Service, among other duties. Bridget can be reached at (866) 226-2224 or councilservices@naepc.org.

IN THIS ISSUE

- April 9, 2014 Webinar, Please Share with Your Members
- Referral Lists & Sample Documents
- NAEPC-hosted Website Platforms

IN EVERY ISSUE

- 51st Annual Conference
- Benefits Available Members of Your Affiliated Local Council
- LinkedIn SubGroup for Council Leaders Only
- Officer Update Form

April 9, 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!

Wednesday, April 9, 2014
3:00 pm - 4:00 pm ET

"The ATRA-Math: Estate Planning After the American Taxpayer Relief Act of 2012"
Expertise offered by Thomas J. Pauloski, JD

About the program:
The American Taxpayer Relief Act (ATRA) of 2012 seems to clarify estate planning, but our research suggests that the reality is far more complex. ATRA's subtle complexities create potential traps for clients and their estate planners. For example, with income tax rates (for some) markedly higher, and transfer tax rates only marginally so, are there circumstances in which a step-up in basis at death may be more valuable than a lifetime gift? How useful is "portability" of the applicable exclusion—and is it more useful in some states than in others? And how might variables that seem to have little to do with estate planning—such as a client's spending rate—affect a wealth transfer plan under ATRA? Thomas J. Pauloski, JD, National Managing Director of Bernstein's Wealth Management Group, will use a series of case studies to explore these and other questions that arise under ATRA. Tom will use sophisticated wealth forecasting software to assess the planning opportunities and trade-offs.

About the speaker:
Thomas J. Pauloski is a National Managing Director in the Wealth Management Group of Bernstein Global Wealth Management, the research division of Bernstein's Private Client Group. He works with private clients and their advisors on wealth transfer strategies, focusing on tax-efficient wealth management and asset allocation decisions. Previously, Tom was a partner at the Chicago law firm of Winston & Strawn LLP, where he concentrated his practice in estate, tax, and business planning. Tom also has been a member of the Chicago law firm of Levin & Schreder, Ltd., a Vice President in the Private Client Group of Zurich Life in Long Grove, Illinois, and a partner at the Chicago law firm of Schiff Hardin & Waite. Tom is a nationally known speaker on estate planning, tax, and insurance issues, and has written numerous articles and continuing legal education materials on estate planning topics. He serves on the faculty of the American Bankers Association National Trust and National Graduate Trust Schools, and has served on the adjunct faculty of the Cannon Financial Institute Schools. Tom has been an adjunct professor at Loyola University Chicago School of Law and has taught estate planning classes at Northwestern University Law School. Tom also has served on the editorial board of *Trusts & Estates* magazine. He retired from the United States Naval Reserve in 2003, after 21 years of service. Tom received his bachelor of science degree in environmental engineering from Northwestern University, and his juris doctor, *magna cum laude*, from Loyola University Chicago School of Law, where he served as editor-in-chief of the *Loyola Law Journal*.

This is an intermediate program.

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. 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.

Referral Lists & Sample Documents ·
NAEPC offers a variety of referral lists and sample documents for councils that are in need of guidance with regard to popular issues. Here are just a few of the documents available to you at http://www.naepc.org/affiliated-councils/referrals:

- NAEPC & the AEP® Designation, What We Are All About?
- Building Relationships with Nearby Councils
- "The Future of Estate Planning", a Task Force Report
- Creating a LinkedIn Group - Considerations & Decisions
- Best Practices for Recognizing New & Existing AEP® Designees
- Council Leadership Day – Why Should Our Council Send a Representative?
- What Type of Insurance Does our Council Need?

NAEPC-hosted Website Platforms ·
As a local EPC leader and volunteer, choosing the right website for your council can be a daunting experience. It can be difficult to know which company is the most reliable and if the pricing is competitive. Since 2000, the NAEPC has been offering websites to its affiliated councils that are easy to use, economical and continuously

enhanced. By subscribing to a NAEPC website, your council will be able to create a "custom" home page, provide links to sponsor and member web sites, send meeting announcements via email and fax, receive RSVPs, post a calendar of events, list current officers and maintain a membership directory with photos. There are opportunities to sell web site sponsorships. Many of the participating councils have done so very successfully and used their site very profitably. If you are interested in learning more about the options available, or if your council has a website and would like an update on the system and its new features, please contact us at councilservices@naepc.org.

51st Annual Conference ·

November 5 – 7, 2014
Just Released!
The early bird brochure for the 51st Annual Conference is now available online and online registration will be open very soon - take a look today! We hope that you will share this information and link with your entire membership.

We have lined up some of the best and brightest minds in estate planning to make impactful presentations on the most recent developments in the areas of estate, tax, trust, insurance and financial planning. This is a great way to receive up to 15 hours of continuing education credit as well. Attendees will come away with specific strategies for putting advance planning concepts into practice in a multi-disciplinary team environment. This program is sure to be of great appeal to your entire membership.

Don't forget about Council Leadership Day! The Wednesday, November 5, 2014 sessions are created just for you – council leaders and staff! Attendees will learn participate in sessions on varying subjects, including:

- 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

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

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.

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