

March 2015 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 the next council board meeting or forward it via email if a meeting is not scheduled soon.**

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### Council Nominated Accredited Estate Planner® Designation ·

All NAEPC-affiliated councils hold the special honor of nominating eligible candidates to receive AEP® designation! Councils with 100 members or less are permitted to nominate one candidate in each discipline plus one in any of the four disciplines for a total of five nominees annually and councils with 101 members or more many nominate two candidates in each discipline plus two additional in any of the four disciplines for a total of ten on an annual basis. The council must submit a board of director's nomination resolution signed by the current president and one additional council officer. As a special benefit to the applicant, the application fee for council-nominated AEP® designation candidates is 50% of the regular application fee, or \$150, and must be accompanied by the \$150 annual dues at the time of application.

All applicants must:

- Hold one or more of the following degrees, licenses or certifications in active status: JD, CPA, CLU®, ChFC®, CFP®, or CTFA; and be actively practicing in one of the following disciplines: accountant, attorney, insurance and financial planner, or trust officer
- Be presently and significantly engaged in estate planning activities, including the accumulation, preservation, and transfer of wealth through proper planning
- Have a minimum of fifteen years of professional experience as an estate planner
- Continuously maintain membership in an affiliated local estate planning council and remain in good standing with all respective professional organizations and licenses

- Sign an applicant declaration agreeing to continuously abide by the NAEPC Code of Ethics and remain committed to the team concept of estate planning
- Complete a minimum of thirty hours of continuing education, at least fifteen of which must be in estate planning every twenty-four months

For more information, best practices with regard to using the program, and a downloadable application form with council nomination resolution, please visit [www.naepc.org/AEP](http://www.naepc.org/AEP) or phone Susan Austin-Carney, NAEPC designation administrator, at 866-226-2224.

### April 22, 2015 Webinar ·

Wednesday, April 22, 2015 3:00pm - 4:00pm

**Decanting an Irrevocable Trust: The Ultimate Do-Over**

**Steven J. Oshins, JD, AEP® (Distinguished)**

Decanting allows the terms of an irrevocable trust to be changed by distributing the trust assets to a different trust with different terms. This has become a popular technique because there are so many people who want to change the terms of their irrevocable trusts.

Steven J. Oshins, Esq., AEP® (Distinguished) is a member of the Law Offices of Oshins & Associates, LLC in Las Vegas, Nevada. He is listed in The Best Lawyers in America® and was named the Las Vegas Trusts and Estates Lawyer of the Year in 2012 and 2015 by The Best Lawyers in America®. He was inducted into the NAEPC Estate Planning Hall of Fame® in 2011.

> [REGISTER NOW!](#) <

### 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)

### Is Your Council Looking for a Website? ·

Did you know that NAEPC offers a variety of website platforms with varying capabilities for your affiliated local council?

- A Level 2 site offers basic pages and features a calendar of events, document library, sponsor options, and an email communication system.
- The Level 3 site builds on these features and adds a secure event RSVP and additional sponsor options.

- The Level 4 site offers everything the other two options do, but builds in a secure payment processing system after you've secured a merchant account.

This really is just a sampling of the features, a detailed list can be found online at <http://www.naepc.org/affiliated-councils/website-packages>, take a look today! The service is enhanced each and every year with new features requested by our users.

A 50% discount is available for new service or upgrades! Contact us today.

## 52<sup>nd</sup> Annual NAEPC Advanced Estate Planning Strategies Conference ·



[Add the 52nd Annual Conference to your Outlook calendar.](#)

Please plan early to join us for another great Annual Conference to be held on November 18-20, 2015, at the Omni Amelia Island Plantation in Amelia Island, FL. As an affiliated council, we ask for your help in three ways:

1. Send an officer and/or staff member to [Council Leadership Day](#).
2. Provide information about the annual conference to every member of your estate planning council. Early bird brochures will be received by your council's contact soon, please pass them out at upcoming meetings and begin talking about the program from the podium at each monthly meeting.
3. Use the "Add to Outlook" option within your communications and on your website so all members can place the program on their calendar early!

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. The Annual Conference is also a great way to receive up to 15 hours of continuing education credit. Attendees will come away with **specific strategies** for putting **advance planning concepts** into practice in a **multi-disciplinary team** environment. Our speakers and topics are posted [online](#), along with the early bird brochure and online registration.

We look forward to seeing both your council and its members in Amelia Island in November! In the interim, watch our [website](#) or contact our national office for more details.



### Best Practice Tidbit ·

As thoughts turn to spring, it is often also time to begin thinking about what your board will look like next season. NAEPC provides a sample board member recommitment form for those councils who wish to ask each board member to re-affirm their commitment to the duties required of them. Click [HERE](#) to obtain a copy.

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 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 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.

### **New Benefit**

***Art of the Estate Tax Return, Second Edition – Estate Planning at the Movies®*** provides in-depth tax analysis and strategic counsel, while offering the ultimate in readability, by connecting well-known motion pictures to practical estate planning and compliance. These connections create great reminders of significant strategies or law, making the tax law fun.

Underlying the cinematic connections, the author shares his best practice tips from a career of preparing, reviewing, and defending estate tax returns, and his greater than 25 years of teaching experience for tax professionals.

This treatise explores the nuances of law and procedure that enter into the preparation and defense of Form 706, including:

- Expanded coverage of portability elections
- Illustrated estate tax returns
- Maximizing valuation discounts and deductions
- Protecting FLPs and FLLCs
- Securing best appraisal results
- Tips to avoid audits
- Pointers on GST reporting
- Cautions and help for fiduciaries
- Warnings and opportunities from inconsistencies in the law
- Strategies for audits and appeals
- And much more!

Winner of the 2010-2011 Award for Outstanding Course Materials by the CalCPA Education Foundation.

NAEPC members are entitled to a 20% discount on this publication.

*Estate Planning At The Movies® is the registered trademark of Keith Schiller.*

## 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).

## 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 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.)

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*The Association of Choice for Estate Planning Professionals*