

March 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!** If you have not already done so, 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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### 2016 Council of Excellence Application Released

We are very excited to announce the release of the 2016 Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award application. This award was created to recognize councils that are successful in their efforts to provide a strong multi-disciplinary council for their members.

The application requests detailed information from your council and is presented in a simple and user-friendly format. Councils will be rated on several areas: leadership and council management; membership growth and retention; programming and events; communications; financial health; general & consumer outreach; and finally, involvement with the National Association of Estate Planners & Councils. Awards will again be offered in five council sizes: extra-small; small; medium; large; and extra-large. The application can be downloaded [online](#). **Application submissions are requested by Friday, May 6, 2016 so don't delay!**

### April 20, 2016 Webinar

3:00pm - 4:00pm ET (attend live or on-demand)

Grantor Trusts - Third Party and Grantor Debt: What Are the Effects During Life and At and After Death?

Jonathan G. Blattmachr, Esq., AEP® (Distinguished)

This intermediate to advanced presentation will cover the fundamental treatment of grantor trusts including transactions with the grantor, the grantor's spouse, or a grantor trust created by either of them as well as transactions with third parties. It will discuss some of the effects of these transactions when grantor trust status ends, either during the grantor's lifetime or upon and by reason of the grantor's death. Knowing the consequences can help in planning and in avoiding adverse tax consequences.

#### 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?



### **53<sup>rd</sup> Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders ·**

#### **EDUCATION & COLLABORATION**

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 16<sup>th</sup>) and two full days of continuing education for every estate planning professional and discipline (Thursday, November 17<sup>th</sup> & Friday, November 18<sup>th</sup>).

Speakers have been announced and can be found [online](#) and registration will be open in April! Every council will receive a supply of early bird brochures in the coming weeks, please make sure to pass these out to your members at upcoming events before the end of your programming season.

### 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.

### 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 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](#)
- [Everything But the House](#)
- [Everplans](#)
- [Family Business Magazine](#)
- [Family Wealth Map](#)
- [Florida Domicile Handbook: Vital Information for New Florida Residents](#)
- [International Association of StoryKeepers \(I-ASK\)](#)
- [Klark Proposal Software](#)
- [Konica Minolta Business Solutions](#)
- [Lawgic, LLC](#)
- [Legal Binder Now \(LBN\)](#)
- [Legal Directives, LLC](#)
- [LegalVault - Revolutionizing Attorney Document Storage](#)
- [Merrill Anderson Company](#)
- [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 LastingMatters Organizer](#)
- [The Ultimate Estate Planner, Inc.](#)
- [Trusts & Estates Magazine](#)
- [Veracity - MTG \(payment processing solutions\)](#)
- [Washington Institute for Graduate Studies](#)

- [Heart2Hearts: Workbook and Deck of Cards, Discuss Directives, LLC](#)
- [International Genealogical Search Inc.](#)
- [WealthManagement.com](#)
- [Wolters Kluwer Law & Business](#)
- [Yourefolio, Inc.](#)

#### **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 [eleanor@naepc.org](mailto:eleanor@naepc.org). **Thank you!**

National Association of Estate Planners & Councils

1120 Chester Ave., Ste. 470

Cleveland, OH 44114

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

[admin@naepc.org](mailto:admin@naepc.org)

*The Association of Choice for Estate Planning Professionals*