

March 2019 Issue

National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter for affiliated local council officers ·

This 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.

Please share this publication with your entire board at its next meeting or forward it via email if a meeting is not scheduled soon.

Scan this message for [HOT TOPICS]!

HIGHLIGHTS

- Message from Chair Kit MacNee
- Regional Leadership Day Cities and Locations Announced – Registration Open
- Council of Excellence Application
- Two New Speakers Available to Councils

IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference · November 5 - 8, 2019, Las Vegas
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



Message from Chair Kit MacNee



What an exciting time it is for NAEPC and our affiliated local councils! The [Council of Excellence](#) application is available, [Regional Leadership Day](#) events will take place in June, and many affiliated councils are preparing to finish up what we know was an excellent season. While these activities are all unique, they are also somewhat related in that each allows us to learn from one another. Councils share successes and challenges during the regional and conference leadership days, the national association gathers information from councils during the Council of Excellence process, members participate in open dialogue at [local events](#) and during the [Annual NAEPC Advanced Estate Planning Strategies Conference](#), and then we share all of those details within notes and during personal conversations.

While there are many associations, NAEPC and your council provide “the place to be”; events and activities where a group of diverse multi-disciplinary professionals can gather together, networking with, and learning from and alongside, one another. What does this all mean to you, your council, and its members? It means that we have been called together in a partnership, working to cultivate excellence in estate planning in service to clients, a very worthy cause. I congratulate your council on its work on behalf of its members and ultimately the clients they serve and look forward to learning more about its plans for the future!

Regional Leadership Day

Regional Council Leadership Day is a complimentary learning and sharing experience for volunteer leaders and executives from estate planning councils within the same geographic region. The day of programming will offer a “hot topic” session followed by a networking luncheon and a roundtable session among the

participants. Each council is encouraged to send multiple officers and the council executive. While most attendees will be from the area nearest the conference, regional programs are open to all estate planning councils and participation from those outside of the immediate area is welcome and encouraged.

[HOT TOPIC] 2019 Schedule:

Atlanta, GA · Tuesday, June 18, 2019

Renaissance Atlanta Waverly Hotel & Convention Center

[REGISTER ONLINE FOR ATLANTA](#)

Bergen County, NJ (Saddle Brook, NJ) · Wednesday, June 19, 2019

Saddle Brook Marriott

[REGISTER ONLINE FOR NEW JERSEY](#)

Denver, CO (Thornton, CO) · Monday, June 24, 2019

DoubleTree by Hilton Denver - Thornton

[REGISTER ONLINE FOR DENVER](#)

Learn more about the event created to enhance your service to your members through usage of NAEPC programs and successful initiatives learned from other councils at www.naepc.org/content/Regional%20Leadership%20Day.

Council of Excellence Application

[The 2019 Council of Excellence application is now available!](#) We look forward to receiving your council's application by the May 15, 2019 deadline. Please contact our office with questions.

Two New Speakers Available to Councils

NAEPC offers all affiliated councils several programming resources. The ["No-Charge" Speaker Program](#), [Robert G. Alexander Webinar Series](#), and [Online Speaker Library](#) provide high-quality speakers on various topics related to estate planning. Councils can also choose to seek input from other councils at the Regional and Council Leadership Day events, as well as within the [LinkedIn group](#) just for leaders. **[HOT TOPIC]** This month we are pleased to announce the addition of two new speakers to the [Online Speaker Library](#):

Diane J. Omdahl, RN, MS

Topics: IRMAA; Medicare basics for senior clients; planning for retirement plans; IRAs and other employee benefits; planning for Americans living overseas; Medicare; Medicare within retirement planning; entitlement programs; long term care; home health care; "The Medicare Conversation: How to Talk About Medicare with your Clients"; "Today's Uncertainties: Life, Death, Taxes AND Medicare Confusion"; "The Most Common Medicare Mistakes and How to Avoid Them"; "Medicare - A Golden Opportunity for Today's Estate Planners"

Eric Weiner, PhD

Topics: the psychology of planning; family legacy conversations; legacy planning using ethical wills; "Family Legacy Conversations: Discussing what Matters Most"; "Leaving Lasting Legacies"; "Family Legacy Conversations: Words from the Jewish Heart"; "Of Wealth and Wisdom: Using Ethical Wills in the Wealth Transfer Process"



56th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders



The [56th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders](#) is scheduled from November 5 – 8, 2019 in Las Vegas 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 5th along with your council's executive*. This day of events offers ample time to meet with and learn from other councils, as well as the leadership of NAEPC. > [Learn more about Council Leadership Day](#)

Speakers and topics will be announced soon and registration opens in April!

[HOT TOPIC] *Council executives attend the Tuesday and Wednesday sessions with the registration fee waived and participate in special executive-only events and meetings.

Robert G. Alexander Webinar Series ·

The Robert G. Alexander Webinar Series provides councils and their members with accessible and affordable multi-disciplinary education. Programs are available live and on-demand and one 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.

Next Webinar

“Qualified Opportunity Zones” with Marc L. Schultz, Esq.
Wednesday, April 10, 2019
3:00pm - 4:00pm ET (or register for on-demand access)

[REGISTER HERE](#) for this webinar
[REGISTER HERE](#) for a series subscription

> [See all upcoming and previous webinars](#)

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 per location)	\$250	\$1,125

Continuing education credit is available at most NAEPC-hosted webinars for Accredited Estate Planner® designees. In addition, a general certificate of completion will be available for those professionals who feel the program satisfies their continuing education requirements and are able to self-file.

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 by 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](#).** See the [full list of opportunities](#).

Please remember... all members must utilize a user name/password to access some 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 ·

[HOT TOPIC] All councils are encouraged to update NAEPC 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.)



NAEPC Minute is an administrative report that does not take the place of *NAEPC News*, the official newsletter of the NAEPC, 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.

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

