

April 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.

IN THIS ISSUE

- May 14, 2014 Webinar, Please Share with Your Members
- We Want to Hear From You!
- Looking for a Speaker?

IN EVERY ISSUE

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

May 14, 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, May 14, 2014

3:00 pm - 4:00 pm ET

"Cognitive Errors in Group Decision Making"

Expertise offered by Nancy B. Rapoport, JD

About the program

This webinar will cover some universal cognitive biases and applying them to typical group decision-making issues. As part of the webinar, we'll relate cognitive biases to ethics.

About the speaker

Nancy B. Rapoport is the Gordon Silver Professor at the William S. Boyd School of Law, University of Nevada, Las Vegas. Her research fields intersect professional responsibility with bankruptcy law, corporate governance, pop culture, and social science. Nancy spoke at the 50th Annual Conference of NAEPC and The NAEPC Education Foundation last November and was quite the hit! Please plan on joining us for this exciting webinar.

This program is suitable for all levels of knowledge.

[REGISTER HERE](#)

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 & Past Programs

The full list of upcoming and past programs can be found at <http://www.naepc.org/events/webinar>. Past programs are available for purchase at the live registration rate.

We Want to Hear From You ·

The Member Benefits Committee of NAEPC, which houses both the “Value Partner” (member benefits) program and the speaker libraries, is interested in hearing your feedback about these programs.

- Are you making the benefits available through the Value Partner program to your members?
- Do your members take advantage of the discounts and find value in the program?
- Have you used either the no-charge speaker program or the online reference library?
- What can we do to make all of these programs more valuable?

Please share your feedback with us by emailing eleonor@naepc.org. All comments will be shared with the Member Benefits Committee for review.

Looking for a Speaker? ·

NAEPC offers two resources to those affiliated local councils that are searching to fill their yearly program.

The first, the “No Charge Speaker Program,” offers councils an opportunity to have a speaker from NAEPC come and present both a technical discussion and a bit about the benefits available to your members through the council’s affiliation with NAEPC. This program is updated yearly and can be found [HERE](#). An update for the 2014-15 season will be available soon.

The second, our “[Online Bureau](#)” is populated by those individuals who have expressed an interest in speaking to local councils. Each speaker listing shows a bit about their topics and area of expertise, and most also include a flyer of general information.

51st Annual Conference ·



*November 5 – 7, 2014
San Antonio, Texas*

We would like to formally invite your leadership and members to attend the [51st Annual Conference](#) in San Antonio this November 5-7, 2014. The first day of the conference is [Council Leadership Day](#) and at the meeting council representatives will gather to share ideas and learn techniques that will help to develop the best possible estate planning council. This day is appropriate for an officer or director and paid administrator from your council to attend. The two days of continuing education that follow feature the most prominent national speakers in the estate planning community. We believe you will not find a better continuing education program in the country. These two days of education are appropriate for every single member of your

council! The conference program has been built in support of our core value, the multi-disciplinary, team approach to estate planning.

The council contact on record has recently received a small supply of “[early bird](#)” brochures via postal mail; please deliver them to your board of directors and general membership. Each of your officers as noted within the NAEPCC records will receive a copy of the full and glossy brochure directly later in the year, but we hope you will assist us now by distributing the early bird information before your programming season ends in the upcoming months. If you need [additional copies](#) of the registration material to distribute, please give us a call or visit the [annual conference](#) page of www.naepc.org for an electronic copy of the file.

Your assistance in making information about the 51st Annual Conference available to your entire membership is most appreciated!

Best Practice Tidbit ·

Some councils have implemented a free guest program for their members, which allows a current member to bring a non-member to a meeting at no charge (guest must be eligible for membership). One council reported that fifty percent of those guests followed-up by joining the council. Adding this type of program provides many benefits, including keeping the existing member engaged, growing the membership, and offering a feeling of inclusion for those who attend in this capacity and choose to join.

Looking for additional best practices and tidbits? Review the notes and related documents from the 50th Annual Conference [Council Leadership Day](#) activities!

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 array of benefits, programs & services 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.

· Benefits for Members of Affiliated Local Estate Planning Councils ·

New! Cloudia Assistant

Commissions are down. Expenses are up. It's time to start being frugal and increase profitability... the days of waste are over. Stop overpaying for overpriced:

- CRM's bloated with features you'll never use
- Drip Marketing programs that are difficult to configure and use
- Automatic Commission Calculation systems
- Lead Tracking systems
- Training & Support
- QUOTE ENGINES that are limited in what they actually quote



Now you can get Cloudia Assistant, the top CRM created by an insurance company for insurance agents and agencies, for only \$29.99 per user per month. Cloudia Assistant includes the most powerful and easy to use drip marketing system available, automated commission calculation system, lead tracking, free training and support, and, if you mention you were referred by NAEPCC, you will get our quote engine absolutely free until July 4, 2015. Also, our quote engine quotes more than you think:

- Health
- Dental
- Indemnity
- Short Term
- Accident
- Critical Illness

That means you can quote package deals for your customers covering all their needs in one shot. Cloudia Assistant is so focused on your success that it will even text you when your client has reviewed the quote so you can act fast to respond while they are in the frame of mind to buy insurance.

Get Cloudia and get affordability, ease of use, a quick learning curve, free support and a free quote engine for more than a year. There is not a better value for insurance people anywhere!

Call 817-778-4508 or e-mail info@cloudiaassistant.com for more information, demo or [Click Here to Sign-Up](#) for a free 15 day look. Please place "NAEPC" in the field asking for your referral.

New! I-ASK (International Association of Story Keepers)



I-ASK is a network of Certified Legacy Planners, estate planners and wealth managers dedicated to educating families about the value of holistic estate planning. Members team up to provide educational seminars, focusing on the valuables and the values side of estate planning, differentiating them in the marketplace.

I-ASK members provide advice and assistance to individuals and families in LegacyStories.org, a family history web library, offering everything needed to organize, preserve and pass down a durable legacy portfolio.

I-ASK Professional Membership is \$149/year and includes:

- Listing in the [LegacyStories.org](http://www.legacystories.org) expert directory: <http://www.legacystories.org/>
- Licensed marketing collateral and presentation videos
- Live holistic estate planning educational and marketing webinars
- Legacy Vault for cloud-secured legacy portfolio storage
- Discounts on legacy-builder toolkits and other products and premiums
- Networking with members for reciprocal client referrals
- Learn more here: <http://www.legacystories.org/about/estate-planner>

NAEPC members are entitled to a 20% discount on their I-ASK Membership. For security reasons, our coupon codes change frequently. Please send coupon requests to support@LegacyStories.org and include your name, phone number, and the name of your affiliated local council.

New! AICPA Conference on Tax Strategies for the High-Income Individual, May 19-20, 2014 - Las Vegas

Brought to you by the AICPA, this high-impact conference is your chance to dig deep into new tax policies, measure their impact and define clear objectives for the future of your high-income clients. Top tax experts will get you up to speed on the 3.8% surtax, the Affordable Care Act and the implications of the Supreme Court decision on same-sex couples. Plus, you will learn strategies for minimizing the impact of increased tax rates, so you can take action on key issues with confidence. Become an ally to your high-income clients and expand your role as a trusted adviser. Take your first step with this conference.

Download the brochure [HERE!](#)

NAEPC members can take advantage of a special discount, creatively named "NAEPCTAX," which provides \$100 off the onsite or online registration fees. This special offer can be combined with the AICPA member discount and the AICPA section discounts.

Existing Benefits

2-Part Webinar Series with Robert S. Keebler - Planning After the DOMA Decision

Acquire Direct Marketing

Advisys

American Dream Planner LLC

Amicus Creative Media

BizActions LLC

Business Valuation Resources, LLC

Cards for a Cure

CBDData™

Charitable Planning Desk Reference for Advisors offered by Strategic Philanthropy

Cloudia Assistant

CrummeyService

DocuBank

Estate Planning Smarts / Pensworth

EstatePlanningBinders.com

Family Business Magazine

Fiserv Investment Services

Florida Domicile Handbook

Heart2Heart Workbook & Deck of Cards, Discuss Directives, LLC

International Association of StoryKeepers (I-ASK)

International Genealogical Search Inc.

Klark Proposal Software

Konica Minolta Business Solutions

Lawgic, LLC

LegacyQuest, LLC

Legal Binders Now

Legal Vault

My Perfect Will

My Personal DataSafe LLC

NationalUnderwriter.com

Oswald Companies Personal Excess Liability

Private Wealth magazine

Ruby Receptionists

Sterling Cut Glass

The ABA Checklist for Family Heirs... / ABA Book Publishing

The Ultimate Estate Planner

Trusts & Estates

Veracity – MTG (payment processing solutions)

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