

April 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.

IN THIS ISSUE

- Referral Lists & Sample Documents
- May 13, 2015 Webinar: Please Share Details with your Members
- NAEPC Welcomes New Estate Planning Councils

IN EVERY ISSUE

- 52nd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders
- Best Practice Tidbit
- Benefits Available Members of Your Council
- Officer Update Form
- Stay Connected Via LinkedIn

Referral Lists & Sample Documents ·

NAEPC offers all affiliated councils access to a growing list of referral lists, presentations, and sample documents to aid in the operation of your council. Found [online](#), this reference library offers sample pre-meeting PowerPoint presentations, sample bylaws and articles of incorporation, best practice recommendations, etc.

We welcome your input! Is there something you would like to see added to this list? [Send us your request!](#)

May 13, 2015 Webinar ·

Wednesday, May 13, 2015 3:00pm - 4:00pm

Case Studies on In-Home Care: Important Information for Your Clients presented by Care.com

Tom Breedlove Director, Care.com HomePaySM

If you have clients who employ a senior caregiver(s), there are important nuances to compliance that may impact your clients, especially if the care is funded through a trust or through third-party payers like Medicaid or Long Term Care insurance. Tom Breedlove of Care.com HomePay Provided by Breedlove, an expert in household employment, will share relevant case studies that illustrate tax and legal risks and how to help your clients avoid them.

Tom Breedlove, Director, Care.com HomePaySM

Tom brings 25+ years of business experience, including 9 years on the executive team at Breedlove & Associates – now Care.com HomePay – the nation’s leading household employment specialist. With a mission to help families handle all the tax and legal obligations that come with employing a caregiver in the home, Care.com HomePay is the go-to resource for thousands of placement agencies, accountants, financial advisors and attorneys. As Director of Care.com HomePay, Tom is a leader of a national service firm focused on delivering a comprehensive solution for busy families with care in the home – handling all of the state and federal employer requirements related to payroll, wage reporting, tax remittance, labor law compliance, and tax agency correspondence. From paydays to tax time and all points in between, Care.com HomePay eliminates all the work and worry for household employers.

THERE IS NO FEE TO ATTEND THIS SPECIAL SPONSORED PROGRAM!

> [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. **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)

NAEPC Welcomes New Member Councils ·

NAEPC is most excited to welcome the following councils to membership during the first months of 2015:

West Broward Estate Planning Council
Young Professionals EPC of Tampa Bay



52nd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders ·

NAEPC would like to formally invite you, your leadership, and your members to attend the 52nd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders in Amelia Island, Florida this November 18-20, 2015.

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 industry. 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; please pass information about the program along to them!**

Your council has recently received a supply of “[early bird](#)” brochures. Please take a moment to pass these materials out to the members of your EPC at upcoming meetings. Should you need more copies, please don’t hesitate to ask.

Finally, registration is now [OPEN](#)! Register soon to take advantage of the \$50 early bird discount.

Best Practice Tidbit ·

Interested in a brief video that provides a refresher of what NAEPC is all about, including the Accredited Estate Planner® designation? Click [HERE](#)!

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.

Existing Benefits

- [Acquire Seminar Marketing](#)
- [American Bar Association Paralegal Program](#)
- [Amicus Creative Media](#)
- [Art of the Estate Tax Return, Second Edition – Estate Planning at the Movies®](#)
- [BVR's Guide to Business Valuation Issues in Estate & Gift Tax edited by Linda](#)
- [International Association of StoryKeepers \(I-ASK\)](#)
- [Klark Proposal Software](#)
- [Konica Minolta Business Solutions](#)
- [Lawgic, LLC](#)
- [LegacyQuest, LLC](#)
- [Legal Binder Now \(LBN\)](#)
- [LegalVault - Revolutionizing Attorney](#)

- [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.](#)
- [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.

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.)

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