

April 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.

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A Message from Committee Chair Kit MacNee, CFP®, CRPC®, AEP®, CSPG



The Council Relations Committee would like to thank Paul Viren for his exceptional leadership over the past several years. He's been elected president-elect of NAEPC and has stepped down as co-chair of the Council Relations Committee. He has been an exceptional mentor and will continue to serve on the committee. I would like to congratulate Michael Panebianco as he assumes the role of vice-chair of the committee and oversight of the Council of Excellence Award process. We also welcomed Sarah D. Lierman to our committee in recent weeks.

As a reminder, Council of Excellence Award applications are due to the national office by Friday, May 6, 2016. Please see the [website](#) for details. This is the second year of awarding this recognition and we hope to see many more councils apply.

The committee would like to welcome Medina Estate Planning Council (OH) as the first new council for 2016. South Plains Trust and Estate Planning Council (TX) and Des Moines Estate Planners Forum (IA) have also joined the association during 2016. Welcome!

Council of Excellence Applications Due May 6th

Is your council submitting an application for the 2016 Council of Excellence Award? Don't delay – the deadline is Friday, May 6, 2016! 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](#).

New Speakers Added to Online Speaker Library

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

The first, 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. Three speakers have been added during 2016. They are:

Leslie Kiefer Amann, JD, TO, AEP®

Leslie's topics include avoiding common mistakes in estates & trusts, choosing fiduciaries, various issues related to trust administration and fiduciary law, UPIA, discretionary distributions and law of property/ownership, among others.

Warren L. Baker, JD, LL.M.

Warren offers a focus on legal and tax issues surrounding retirement accounts, specifically retirement accounts that hold "nontraditional" or "alternative" assets.

Shane Westhoelter, AEP®, CLU®, LUTCF

Shane's topics include general estate planning, trends in estate planning, life insurance in estate planning, planning for retirement plans, IRAs and other employee benefits, the psychology of planning, and quality life planning.

The second, 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 2016-17 season will be available on or before April 29th.



53rd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders ·

EDUCATION & COLLABORATION

November 16-18, 2016

Phoenix / Scottsdale, Arizona

Join us for our signature annual event where estate planning council members and leaders will gather to learn from the brightest professionals in the community and one another, and refresh at The Wigwam. With competitive registration fees and an exceptional program, this IS the conference to attend in 2016! Full program information and online registration can be found on our [website](#).

The Annual NAEPC Advanced Estate Planning Strategies Conference is an event for both council leaders and members alike. The program has two distinct portions – Council Leadership Day, planned just for EPC board members, and Technical Education, created for council members. We need your help to “spread the word” about this exciting program! Please consider:

- Delivering the recently-received supply of early bird brochures to your general membership. If you need additional copies of the registration material to distribute at your upcoming council meetings, please call or email eleanor@naepc.org.
- If your council is not participating in the “Every Council Campaign,” but would be willing to allow us to email or send hard-copy brochures to your membership, or if you are willing to email the file from your office, please contact Eleanor M. Spuhler at the NAEPC office to facilitate the process. We will accommodate your needs with regard to member privacy!
- Plan on sending a current executive committee member and council staff to Council Leadership Day, the only opportunity each year to spend time with and learn from other council leaders!

Registration is now OPEN! Visit www.NAEPc.org/conference to reserve your spot!

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-](#)
- [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](#)

[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](#)
- [Heart2Hearts: Workbook and Deck of Cards, Discuss Directives, LLC](#)
- [International Genealogical Search Inc.](#)

[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](#)
- [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 eleonor@naepc.org. **Thank you!**

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The Association of Choice for Estate Planning Professionals