

April 2018 Issue

National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter for affiliated local council officers ·

This monthly 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. *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 contact the national office if you have questions about your council's status within the Every Council Campaign.

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

HIGHLIGHTS

- 2018 Council of Excellence Award Applications Due in 4 Weeks!
- June 2018 Regional Leadership Day Events in California & Washington, All Councils Welcome
- More New Member Benefits

IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference – November 6 - 9, 2018
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Council Leadership Group on LinkedIn

Scan this message for **[HOT TOPICS]**!

2018 Council of Excellence Award Application

The Council of Excellence application deadline is just 4 weeks away; submissions are requested by Friday, May 25, 2018! > [Download the application](#)

Regional Leadership Day Events

[HOT TOPIC] > [Learn more about Regional Leadership Day](#)

Tuesday, June 19th · Anaheim, CA

Thursday, June 21st · San Francisco, CA

Monday, June 25th · Seattle/Tacoma

All councils within a reasonable distance of these cities are encouraged to send multiple board members and those from outside of the immediate area are also welcome to attend; a block of rooms is available for those in need of overnight accommodations. [Registration is open!](#)

New Member Benefits

Each month we talk about member benefits within this newsletter – a valuable list of opportunities available to your members, for which your board must do no additional work to provide (other than making sure members know these benefits are available, of course!). This month we're excited to highlight new or updated benefits!

Attendee Discounts

[AICPA ENGAGE](#)

June 9-14, 2018, Las Vegas - What you will find at AICPA ENGAGE: four days of thought-provoking questions; candid insights; and deep technical dives and even some radical ideas. As a sponsor of the unique event, NAEPC is able to extend a colleague discount - save \$100 with code "ENG18NAEPC" at checkout.

Other New Benefits [HOT TOPIC]

[LINK: Advanced Online Training in Collaboration](#)

See what everyone is talking about and learn more about this new benefit, created especially for NAEPC in support of our core value – the multi-disciplinary approach to estate planning!

[CollectorIQ](#)

Committed and casual (or accidental!) owners of valuable works often require updated valuations and/or liquidity alternatives. CollectorIQ is the most efficient, cost-effective and objective tool giving fiduciaries and other advisors around the world the ability to track this large component of owned wealth. CollectorIQ offers proprietary data, valuation, and liquidity tools that combine traditional collection management with data aggregated from thousands of sources in real-time and analyzed instantly to provide accurate value trends. CollectorIQ's deep public and private data allow collectors and advisors to make better planning and buying and selling decisions with instant auction price comparables and sale trends. Its iOS application enables users to have collection access anywhere. Security and privacy are of paramount focus. We employ bank-level digital security and are the only platform currently deployed at major financial institutions in the U.S. and Europe. That's why institutions and collectors have entrusted over \$8 billion in collection assets to CollectorIQ. NAEPC members receive a 20% discount off of annual software subscription fee for the Advisor product. The offer is good for 1 year only for new subscribers. Interested parties should email info@collectoriq.com and reference the NAEPC discount in email.

[Wolters Kluwer Tax & Accounting – CCH Publications](#)

Wolters Kluwer Tax & Accounting offers innovative, integrated and customer-focused solutions that support the workflow of CPAs, corporate tax and accounting departments, and auditors — enabling growth, enhancing productivity and increasing profitability. Expert analysis, authoritative content, high-quality software applications and integrated workflow productivity tools allow professionals to turn information into action. Through an Association Alliance Program, Wolters Kluwer offers a generous 35% discount on valuable and industry leading research publications. This relationship gives you the necessary tools to expand your professional development, enhance your knowledge and increase your expertise on tax, accounting, financial and estate planning, audit topics and more. With leading titles in taxation, accounting, estate planning and more, the 100+ CCH Publications offer expert information to help NAEPC members stay on top of industry and market-leading developments. Publications are available in both print and eBook formats. To obtain the link to the special NAEPC website and the association's discount code, council members must log in to either the local or national website.



55th Annual NAEPC Advanced Estate Planning Strategies Conference
with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION

The [55th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for](#)

[Council Leaders](#) is scheduled from November 6 – 9, 2018 in Ft. Lauderdale and we hope your council leadership and membership will be well-represented there!

What's new?

- [Speakers and topics have been released](#) and now span two and one-half days and provide up to 17 hours of national and multi-disciplinary continuing education credit
- Council Leadership Day, the portion of the conference for your board members and executive, now takes place on Tuesday and will have a new look and feel
- [Companion programs](#) have been announced

What's next?

- **[HOT TOPIC]** Registration will soon be available to your leaders and members
- Each council can expect to receive a supply of the early bird brochures for distribution

Robert G. Alexander Webinar Series ·

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

The Top 20 Insurance Planning Mistakes - How to Avoid or At Least Fix Them with Lawrence Brody, JD, LL.M., AEP® (Distinguished)
Wednesday, May 9, 2018 - 3:00pm - 4:00pm ET

This intermediate presentation will focus on a series of life insurance planning mistakes which are commonly made in an estate planning context. In addition to identifying the common mistakes, the presentation will also offer suggestions for how to fix those mistakes (where that is possible) and in any event, how to avoid those mistakes in planning for the use of life insurance in a client's estate plan. > [For more details and to register online](#)

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)	\$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 made 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 on

behalf of 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](#).**

Click on the links below to browse the list of all by category, or see the [full list of opportunities](#).

- [NAEPC-Provided Benefits](#)
- [Educational Opportunities](#)
- [Marketing and Website Design Services](#)
- [Presentation Materials and Office Supplies](#)
- [Software](#)
- [Subscriptions and Publications](#)
- [Complimentary Resources](#)
- [Discipline-Specific Information](#)
- [Other Benefits, Programs & Services](#)

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.

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](#).

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.)

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