

May 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.

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NAEPC-hosted Website Platforms ·

NAEPC offers a variety of website platforms for your affiliated local council with varying capabilities.

- A Level 2 site offers basic pages and features: a calendar of events, document library, sponsor options, and an email communication system.
- The Level 3 site builds on these features and adds a secure event RSVP and additional sponsor options.
- The Level 4 site offers everything the other two options do, but builds in a secure payment processing system after you've secured a merchant account.

This really is just a sampling of the features, a detailed list can be found online at <http://www.naepc.org/affiliated-councils/website-packages>, take a look today!

This is a great time of year to consider starting or upgrading your service. In addition to a 50% new or upgraded service discount all website platforms, which range from \$800 - \$1600 regularly, we also offer an additional 50% discount for those councils that start new service on or after July 1st. Your council can have a website up and running for as little as \$200 this year! Contact our office today for more details!

June 11, 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, June 11, 2014 / 3:00 pm - 4:00 pm ET

"Charitable Strategies to Help Create and Protect Legacy" expertise offered by Laura Malone, CAP®, CEPA

About the program:

Today's family dynamics, complexity of asset types, investment sophistication, and revised tax laws have brought charitable conversations more "front and center" to more of an income than estate tax planning discussion. Furthermore, today's giving goals may often require a combination of charitable giving vehicle solutions. If you are delaying these charitable conversations with your clients you may be missing opportunities to help your client create current tax benefits as well as prepare their heirs today for the wealth they may receive in the future. Join us as we discuss charitable client conversations around giving vehicles, ATRA, family giving strategies, and how these topics can enhance your client relationship.

About our speaker:

Laura Malone, CAP®, CEPA is Vice President at American Endowment Foundation (AEF) a national, independent donor advised fund solution. Through her work at AEF, Laura has consulted hundreds of trusted advisors, families and business owners about charitable giving strategies. Laura holds her Chartered Advisor in Philanthropy® designation from The American College and serves as a faculty member for the Exit Planning Institute's Certified Exit Planning Advisor (CEPA) Program. She has spoken both locally and nationally to various financial, tax and estate planning organizations and sits on the boards of the International Association of Advisors in Philanthropy, the Northern Ohio Planned Giving Council, the Financial Planning Association of Northeast Ohio as well as The Estate Planning Council of Cleveland.

[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.

Council Nominated AEP® Designation Program

As an affiliated local council, you hold the special honor of nominating eligible candidates to receive AEP® designation! Councils with 100 members or less are permitted to nominate one (1) candidate in each discipline plus one (1) in any of the four (4) disciplines for a total of five (5) nominees annually and councils with 101 members or more many nominate two (2) candidates in each discipline plus two (2) additional in any of the four disciplines for a total of ten (10) on an annual basis. The council must submit a board of director's nomination resolution signed by the current president and one additional council officer. As a special benefit to the applicant, the application fee for council-nominated AEP® designation candidates is 50% of the regular application fee or \$125 and must be accompanied by the \$125 annual dues at the time of application.

All applicants must:

- Hold one or more of the following degrees, licenses or certifications in active status: JD, CPA, CLU®, ChFC®, CFP®, or CTFA; and be actively practicing in one of the following disciplines: accountant, attorney, insurance and financial planner, or trust officer
- Be presently and significantly engaged in estate planning activities, including the accumulation, preservation, and transfer of wealth through proper planning
- Have a minimum of fifteen (15) years of professional experience as an estate planner
- Continuously maintain membership in an affiliated local estate planning council and remain in good standing with all respective professional organizations and licenses
- Sign an applicant declaration agreeing to continuously abide by the NAEPC Code of Ethics and remain committed to the team concept of estate planning
- Complete a minimum of thirty (30) hours of continuing education, at least fifteen (15) of which must be in estate planning every twenty-four (24) months

For more information, best practices with regard to using the program, and a downloadable application form with council nomination resolution, please visit www.naepc.org or phone Susan Austin-Carney, NAEPC designation administrator, at 866-226-2224.

New Councils ·

We are most excited to welcome two new councils to membership during 2014:

Catoctin Estate Planning Council (VA)
Heart of Ohio Estate Planning Council (OH)



51st Annual Conference ·



November 5 – 7, 2014
San Antonio, Texas

The 51st Annual Conference is just over five months away... don't delay, make your reservation today! The November 5th – 7th conference in San Antonio is sure to be every bit as successful as the 50th Annual Conference; we hope to see your council well-represented at the event.

Your assistance is requested in four ways:

- Please play our newly-released [promotional video](#) at an upcoming council meeting.
- Please deliver 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!
- Consider 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!

Best Practice Tidbit ·

Is your council considering a social media presence? If LinkedIn has made your list, please review our helpful guide to getting started at http://www.naepc.org/assets/national/pdf/council_referral_linkedin.pdf.

Looking for additional best practices and tidbits? Visit the "[Referral Lists](#)" page of the website built just for you – council leaders!

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.

Existing Benefits

Acquire Direct Marketing
Advisys
American Dream Planner LLC
Amicus Creative Media
BizActions LLC
Business Valuation Resources, LLC
Cards for a Cure
CBData™
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.

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