May 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.

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NAEPC Collecting Formation Date for all EPCs

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 eleanor@naepc.org. **Thank you!**

No-Charge Speaker Program Released for 2015-2016

Each year, a variety of speakers are made available to NAEPCs affiliated local councils through the “No Charge” speaker program (council must fund travel, lodging and meeting expenses as outlined within the informational packet). This benefit has been wildly successful since its inception and we are pleased to provide the packet for the 2015-16 fiscal year by clicking HERE.

June 10, 2015 Webinar, Please Share with Members

Wednesday, June 10, 2015 3:00pm - 4:00pm ET
Sophisticated Transfer Planning Strategies for Business Owners
Diana S.C. Zeydel, JD, LL.M.

The intermediate/advanced session will discuss the risks and benefits of various cutting-edge estate planning techniques used to transfer wealth at a reduced transfer tax cost. The latest variations on the installment sale to a grantor trust, leveraged GRATs, testamentary CLATs, Split Purchase Trust and the Supercharged Credit Shelter Trust will be analyzed. Attendees will learn how to maximize benefits and minimize risks of using proactive strategies, examine the financial benefits and probability of success of various techniques, as well as understand how best to assist clients in determining the right approach and how the most sophisticated techniques work legally.

Diana S.C. Zeydel is the National Chair of the Trusts & Estates Department of Greenberg Traurig, P.A. and is a member of the Florida, New York and Alaska Bars. She focuses her practice on estate, business succession and tax planning for high-net-worth individuals and families as well as planning for U.S. and non-U.S. citizens and residents. Diana specializes in sophisticated intra-generational wealth transfer strategies, business succession planning and complex transfer tax controversies. She received her LL.M. in Taxation from New York University School of Law (1993), her J.D. from Yale Law School (1986) and her B.A. from Yale University (1982).

< 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)

Councils may also choose to use a webinar as a creative programming option. The council can choose to host the program when it airs live or purchase a past program to use on-demand. It's as simple as securing a room and internet connection with sound and inviting members to attend! Contact the NAEPC office with questions or to get started! This is the perfect solution for brown bag luncheons and can even be sponsored - try building one into your 2015-16 program schedule.

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

EDUCATION & COLLABORATION

NETWORK WITH THE BEST · LEARN FROM THE BRIGHTEST · ATTEND THE EXCEPTIONAL

November 18 - 20, 2015
Amelia Island, Florida · Omni Amelia Island Plantation

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, experience the charm that is

Amelia Island, Florida, and refresh at the Omni Amelia Island Plantation. With competitive registration fees and an exceptional program, this IS the conference to attend in 2015! 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!

Best Practice Tidbit ·

It's that time! Year-end for most EPCs. As you gather together as a new board over the summer months, feel free to use the sample board recommitment form offered by NAEPC to help your board members understand and reaffirm their commitment to your council. Click HERE for the document.

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.

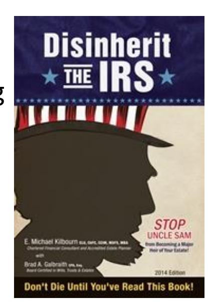
Member Benefits, Programs & Services Recap ·

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.

Featured Benefits (visit www.NAEPC.org for more information)

Disinherit the IRS



In today's competitive financial services industry, you need more than just a license to sell insurance, securities, and investment products. Studies on generational marketing reveal a different kind of decision-making process is now taking place in America. The Greatest Generation is beginning to pass its wealth to the Baby Boomer and X generations and this means your style of sales will need to adapt if you want to build new relationships and gain their trust. Education is a key factor in marketing to these sophisticated clients. But it takes more than just a slick product brochure. And while a generous expense account can help you build a relationship over dinner, these consumers will need more than just a nice conversation. That's why Author and Family Wealth Preservation Specialist E. MICHAEL KILBOURN dusted off his best-selling book Disinherit the IRS, and rewrote it in 2014. NAEPC members receive a 25% discount off the retail price by logging in to the members only section and placing an online order.

AICPA Advanced Estate Planning Conference, July 20-22, 2015, Salt Lake City, UT

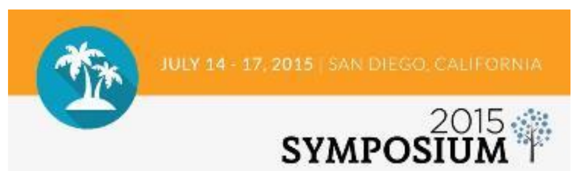
During the 2015 AICPA Advanced Estate Planning Conference, you'll get up to speed on the most current aspects of estate, gift and inheritance planning. Respected experts will share updates from the Hill, with advanced technical training, interactive sessions, case studies and more. Don't miss this opportunity to discover sophisticated insights into estate planning's newest challenges, and gain the resources to effectively construct your clients' estate plans.

Who Should Attend

CPAs, financial planners, attorneys, insurance agents and tax advisors with a fundamental knowledge of estate planning.

WealthCounsel 2015 Symposium, July 14 - 17, 2015, San Diego

This special conference is full of valuable learning, collaboration and guidance on how to advance your practice. Now, prepare yourself for an even more memorable experience at Symposium 2015 with 3 ½ days of learning and networking:



- Fill your first day with half-day intensive courses or take in San Diego through fun excursions that include collaborative discussions
- Mix up your learning experience with 90-minute classroom breakouts and 60-minute workshops, presentations and panel discussions
- Be inspired by BOLD Talks - short, motivational stories of personal growth and success
- Get your day off to an energizing start with powerful keynote speakers

You'll learn. You'll network. You'll discover new ways of thinking that can help you elevate your practice. You'll be glad you made the decision to be in San Diego for a new and exciting Symposium experience.

This isn't going to be an ordinary conference.
This is Symposium 2015.

Existing Benefits

- Acquire Seminar Marketing
- American Bar Association Paralegal Program
- Amicus Creative Media
- Bloomberg BNA's Art of the Estate Tax
- International Association of StoryKeepers (I-ASK)
- Klark Proposal Software
- Konica Minolta Business Solutions
- Lawgic, LLC

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
- 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.
- LegacyQuest, LLC
- Legal Binder Now (LBN)
- LegalVault - Revolutionizing Attorney 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.)

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The Association of Choice for Estate Planning Professionals