

May 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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June 8, 2016 Webinar, Please Share With Your Members

Wednesday, June 8, 2016 - 3:00pm - 4:00pm ET

Pulling a Rabbit Out of the GRAT Hat: Some of the Most Creative Structural GRAT Planning Ideas We See Out There with S. Stacy Eastland, JD, AEP® (Distinguished)

This advanced program will cover some creative planning ideas to use with GRATs.

Stacy Eastland is a Managing Director at Goldman Sachs. He joined the firm to expand the advisory team working with Private Wealth Management clients. He currently works with private clients and their own advisors with their strategic wealth management plans, combining a variety of income tax, estate planning and gifting techniques. Prior to joining Goldman Sachs in October 2000, Stacy was a senior partner with Baker Botts, LLP in Houston, Texas. Stacy received his B.S. (with Honors) from Washington & Lee and his J.D. from The University of Texas (with Honors). [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.**

Registration Fees

- \$40 / Accredited Estate Planner® designee
- \$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

The Robert G. Alexander Webinar Series was launched in September 2013 to provide estate planners with accessible, high quality, multi-disciplinary education. Programs are available live and on-demand to individuals and to be used as group gatherings where EPC members view the program together in a single location. New in 2016, we are excited to announce yearly subscription rates that provide access to all programs during the calendar year. For the full schedule of national presenters, information about both individual and subscription rates, and an archive of prior programs, please click [HERE](#). Why not consider adding a webinar to your schedule as a new and creative program?



New Website Features Released

NAEPC offers a variety of continually-enhanced website platforms for your affiliated local council with varying capabilities. A detailed list of the offerings can be found [online](#), take a look today!

We have recently launched several new features related to event RSVPs for Level 3 and 4 sites. These features include the ability for an administrator to record show/no-show status for each event attendee, edit existing RSVPs, to manually create an RSVP for a member, and to see all activity for a single member. These new features begin our journey down the path to creating a much more robust administrative back-end that can also serve as the council's primary database.

This is a great time of year to consider starting or upgrading your service and to have that discussion with your board of directors. In addition to a 50% new or upgraded service discount on 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, 866-226-2224 or councilservices@naepc.org!

Council Nominated Accredited Estate Planner® Designation Program – Resources for EPCs

The [AEP® designation](#) is awarded by NAEPC to estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character and helps both clients and colleagues understand a belief in, and dedication to, the team concept of estate planning. The designation is available to attorneys, Chartered Life Underwriters®, Certified Public Accountants, Certified Trust and Financial Advisors, Chartered Financial Consultants®, and Certified Financial Planners® who are actively engaged in estate planning and meet stringent qualifications at the time of application, and who commit to ongoing continuing education and recertification requirements.

Your estate planning council is afforded the special honor of nominating qualified individuals to receive the designation through NAEPC's "AEP® Council Nomination" program. Individuals must meet strict requirements to be considered, a list of which can be obtained by contacting the national office. Many councils have chosen to host an informational reception about the designation program for qualified members. To show our appreciation for your willingness to do so, we will reimburse your council for expenses of up to \$500 to host this event (a commitment form is required prior to scheduling the event). For more information, please email admin@naepc.org or phone the national office.



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

November 16-18, 2016

Phoenix / Scottsdale, Arizona

What's so special about the [Annual NAEPC Advanced Estate Planning Strategies Conference](#), anyway?

- ⌘ The program provides direct access to nationally-known presenters providing education suited to every member of your council.
- ⌘ It's NAEPCs only face-to-face meeting each year.
- ⌘ Attendees will receive nationwide, multi-disciplinary continuing education credit.
- ⌘ The registration fee is low with most meals included.
- ⌘ Participants will experience the unique charm of our host resort, The Wigwam.

How can our council participate?

- ⌘ Send a member of your executive committee or board and council staff to [Council Leadership Day](#). (Paid administrators attend the program with no registration fee!)
- ⌘ Set a board goal to have at least 10 regular members of your council attend the Technical Education portion of the program – plan a special “meet and greet” while together in Arizona!
- ⌘ Include the “early bird” brochure in your council dues mailings and email messages.
- ⌘ Distribute copies of the conference brochure at remaining meetings or as the council season gets started in the fall.
- ⌘ Explain the relationship between NAEPC and your EPC at council gatherings.

This is your conference – a program built by and for estate planners! Plan on attending in 2016!

Additional copies of the early brochure are available by contacting the NAEPC office at (866) 226-2224 or conference@naepc.org.

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

- ⌘ [Marketing and Website Design Services](#)
- ⌘ [Educational Opportunities](#)
- ⌘ [Subscriptions and Publications](#)
- ⌘ [Programs and Services for Council Development](#)
- ⌘ [Software](#)
- ⌘ [Presentation Materials and Office Supplies](#)
- ⌘ [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.

Featured Benefit

Trusts & Estates' in-depth peer-reviewed articles have made the magazine the authority on estate law, tax issues, and wealth management for over a century. Attorneys, fiduciaries, accountants, investment advisors, charitable giving specialists, family office executives, insurance agents, and valuation experts all contribute their insight and advice to the pages of the magazine. Always with a view to helping you better meet your client's needs. Written by experts for experts!
All the benefits of full priced subscriptions are yours...even at this low rate!



Every subscription includes 12 monthly issues of Trusts & Estates magazine, in print and digital editions.

Unlimited access to ALL Trust & Estates online premium content.

Full access to our exclusive Trusts & Estates Plus iPad app.

Our annual supplements: Tax Year In Review and Charitable Giving

Three monthly e-newsletters: Conrad Teitell's Philanthropy Tax e-Letter, reporting and analyzing an important tax development governing charitable contributions; Wealth Watch News, reporting on federal and state government estate tax, retirement benefits, and life insurance reforms; and The Trusts & Estates Technology Review, examining high-tech resources for the trusts and estates practitioner.

Subscribe to Trusts & Estates at the low member's price of just \$149. Save 60% off the regular \$375 rate! Click the "special offer" link to take advantage! [SPECIAL OFFER](#)

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