

May 2017 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 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 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.

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June 14, 2017 Webinar

3:00pm - 4:00pm ET (on-demand access is also available)

A Potpourri of Planning Ideas with Life Insurance

Lee J. Slavutin, MD, CLU®, AEP® (Distinguished)

This intermediate session discusses basic insurance planning ideas, for example beneficiary designations, the importance of choosing a strong company, and common tax traps to avoid; as well as more sophisticated concepts such as intergenerational split dollar.

Lee J. Slavutin, MD, CLU, AEP (Distinguished) is a principal in Stern Slavutin 2, Inc., an insurance and estate planning firm in New York. He graduated from Monash University Medical School in Melbourne, Australia in 1974 and became a Fellow of the Royal College of Pathologists of Australia and a Diplomat of the American Board of Pathology in 1981. Dr. Slavutin left the practice of medicine in 1982 and entered the life insurance business in 1983. He is a member of the Association of Advanced Life Underwriting and the Million Dollar Round Table and is a Chartered Life Underwriter with the American College. Dr. Slavutin has published over 170 articles on insurance and estate planning topics for CCH, Warren Gorham and Lamont, Practitioners Publishing Company (PPC), New York Law Journal and others. He is a member of the CCH Estate and Financial Planning Advisory Board and the PPC Tax Action Panel, and was elected into the Estate Planning Hall of Fame® in 2014. He is the Author of "PPC's Guide to Life Insurance Strategies", 18th edition (2016), published by Thomson Reuters. Dr. Slavutin has spoken before the American Law Institute/American Bar

Association, the New York County Lawyers' Association, the American Institute of Certified Public Accountants, the New Jersey State Society of CPAs, the Association of Advanced Life Underwriting, the Million Dollar Round Table, and the UJA-Federation Annual Tax and Estate Planning Conference, as well as many New York accounting and law firms. He was invited to testify before the New York State Senate on the effectiveness of the insurance rating firms and worked with the U.S. General Accounting Office on a similar project. He is married to Dee and they have two children, Aaron and Lydia.

Individual Webinar Registration Fees

\$40 Accredited Estate Planner® designee

\$60 Member of an affiliated local estate planning council or at-large member of NAEPC

\$100 Non-member

\$250 Council meeting or group gathering

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.**

Year-End Survey Results

At the conclusion of 2016 all councils were asked to participate in a survey intended to gather details on speakers, programming, best practices and accomplishments from the year. Results are available by clicking [HERE](#) or by visiting <http://www.naepc.org/conference/leadership-day>. Learn what councils are saying about hot topics like programming, events, and speakers!

Call for Volunteers

The Council Relations Committee is looking for additional volunteers! Are you interested in serving as the conduit between the councils in your territory and NAEPC, assisting with affiliated local council retention and growth, and helping councils become stronger and more versed in the benefits, programs & services provided through their affiliation? If so, we want to hear from you! The committee typically meets on the 4th Thursday of each month at 11:00 am ET for 30 minutes. Additional outreach may also be requested several times through the year. Contact the national office at admin@naepc.org to learn more.



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.

New Benefits!

AdvisorAdit - Mobile Event Services for Estate Planning Councils

DIGITAL CONFERENCE BOOK - COURSE SURVEYS - ATTENDANCE TRACKING

Introducing New NAEPC Program: 50% off standard rates and a free trial! [Click for a Quick Tour!](#)

Our suite of mobile event services is a cost-effective way to modernize your attendee experience. With AdvisorAdit's suite of digital event services EPCs enjoy:

- An intuitive attendee experience...available on any leading mobile device
- Simple event set up and real time host monitoring, updating and reporting
- Flexibility to use only the services that are right for your event
- Special NAEPC pricing scaled to support small meetings to large expos

Our suite of digital event services... select the ones for you!

- *Digital Conference Book*: For less than the cost of printing, you can offer attendees access to a fully branded app delivering all conference-related handouts. Consider enabling sponsors to add their own content. This is a fantastic way to "Go Green"!
- *Surveys*: Dramatically increase attendee feedback with integrated course level surveys! Use our standard survey or create your own. Hosts can instantly share results with speakers and colleagues.
- *Attendance/CE Tracking*: Stop collecting CE forms and wasting time and money on manual reporting! Members can apply for CEs (up to 7 designations) and even update their credentials. Hosts have full transparency and control with real time reports.
- *Certificates*: Delight attendees with instant access to designation level certificates! With extended certificate access, you can even create your council's own "My CE" page on their website.

"I use a new tool called AdvisorAdit...It has eliminated all the paper sign in sheets for credit, all the report preparation plus instant certificates. Also, we can upload all the handouts for presentations and sponsor content. It does even more but even if it didn't it would still be great!"
- Melissa Simpson, EPC of Central PA

NAEPC Special Pricing – 50% off standard rates available only to NAEPC-affiliated councils! Our pricing is simple and extremely cost effective: Just \$1/attendee per service for a one day event for up to 3 designations. Contact us for additional services or large meeting discounts. Contact info@advisoradit.com to learn more or to take advantage of our free trial that includes Digital Conference Book, Survey, Attendance/CE tracking, Certificates and reporting services for EPC content. Good for one event up to 50 attendees and up to 3 designations.

AICPA Engage - June 12-15,2017 - MGM Grand Las Vegas, NV | Online Broadcast



The AICPA Advanced Estate Planning and Personal Financial Planning Conferences join AICPA ENGAGE this June. Experience four days of fresh ideas and breakthrough presentations — all under one roof.

Bring the greatest value to your clients by becoming the most trusted resource for navigating shifts and changes in the global economy. Immersed in four days of leading-edge best practices and ideas from esteemed thought leaders in financial planning and estate planning, you'll learn why past attendees rave about this conference every year.

Choose among five tracks for focused learning: Insurance and Risk Management, Investment Management, Practice Management and Technology, Wealth Management and Tax, and Retirement Planning. You'll refine business strategies, implement new techniques, and learn a holistic approach to every life stage affecting your client's financial outlook

Learn more and register by clicking [HERE](#). NAEPC members are entitled to take advantage of a \$100 discount by using code "100ENG17" at checkout.

American Law Institute CLE (ALI CLE) "Estate Planning In-Depth", June 25-30, 2017 – Wisconsin

American Law Institute CLE (ALI CLE) is pleased to offer NAEPC members a special 40% discount off the regular registration fee for its annual summer CLE conference, [Estate Planning in Depth](#). This course is co-sponsored by CLE for Wisconsin and will be held at the University of Wisconsin School of Law in Madison and via live video webcast on June 25-30, 2017.



Addressing the significant tax and non-tax aspects of estate planning, as well as the latest developments and case law, this one-of-a kind-conference features a veritable “who’s who” of estate planning experts on the

faculty, an agenda that allows more time to dig deep into the issues, and a host of informal learning and networking opportunities, all in a relaxed summer campus atmosphere.

To receive a 40% discount, NAEPC members may register by June 1 at www.ali-cle.org/CY020 and enter coupon code CY020NAEPC at checkout. (This offer is valid on new registrations for the in-person course and full webcast only, and may not be combined with other offers, including group discounts.)

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.

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

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The Association of Choice for Estate Planning Professionals