

May 2018 Issue

National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter for affiliated local council officers ·

This 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.

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

HIGHLIGHTS

- Special Message from Council Relations Committee Chairperson Kit MacNee
- June 2018 Regional Leadership Day Events in California & Washington, Register by June 13th
- 2018/19 Programming Resources

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



Message from Council Relations Committee Chair Kit MacNee

This is an incredibly exciting time of year for NAEPC! The Council of Excellence application deadline was May 25th and we are grateful for the number of applications received and can't wait to get started with the review and selection process.

The committee also welcomed many new members recently, a list of whom can be [found on our website](#). The dedicated individuals on this committee work very hard to help affiliated local estate planning councils take advantage of the benefits, programs and services available through membership in NAEPC and to share the message of NAEPC with those councils that are not currently affiliated. **[HOT TOPIC]** We're always

looking for volunteers and currently have openings in the GA, CT/MA, KY, MI, MN/ND/SD, and ID/UT areas. [Learn more about volunteering with NAEPC today!](#)

And finally, we are very excited to soon be releasing a brand new schedule for Council Leadership Day! The new format will offer an opportunity for more interaction with fellow council leaders, provide additional two-way conversation, and allow your council to choose topics based on what is most important to your leadership right now. Stay tuned for more information on this very exciting update to the annual conference!

Regional Leadership Day Events

Tuesday, June 19th · Anaheim, CA

Thursday, June 21st · San Francisco, CA

Monday, June 25th · Seattle/Tacoma

Regional Council Leadership Day is a learning and sharing experience for volunteer leaders and executives from estate planning councils within the same geographic region. 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.

[HOT TOPIC] [Please register by June 13th -](#)

Four Reasons to Attend

1. Spend time with, and learn from, volunteer leaders from councils nearest you
2. Conference schedule is created with YOUR input - we'll make sure that the items that are most important to you are included
3. Enhance your service to your members through NAEPC programs and successful initiatives learned from other councils
4. Maximize the value of your council's membership in NAEPC

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

2018/19 Programming Resources

Did you know that NAEPC has multiple resources for affiliated councils looking to fill their programming schedule? It's true!

[HOT TOPIC] Learn more about all of the options [on our website](#), including the newly-released 2018/19 "No-Charge" Speaker Program, which features current board members of NAEPC and national past presidents who offer both a technical presentation and a bit about NAEPC with no honorarium! Take a look today -



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

November 6 – 9, 2018 · Ft. Lauderdale

What's new?

- [Registration is open!](#)
- The ["early bird" brochure](#) has been published and all councils will soon receive a small supply from NAEPC
- Speakers and topics now span two and one-half days and the event will provide up to 17 hours of national and multi-disciplinary continuing education credit

We hope your council leadership and membership will be well-represented in Florida this November!

[Robert G. Alexander Webinar Series](#) ·

The Robert G. Alexander Webinar Series provides councils and their members with accessible and affordable multi-disciplinary education. Programs are available live and on-demand (to watch at a time that fits your schedule) 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

Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change with Joshua S. Rubenstein, JD, AEP® (Distinguished) · Wednesday, June 6, 2018 - 3:00pm - 4:00pm ET

This presentation will include observations on how difficult it has become to do estate planning and wealth preservation for clients when the rules change constantly. It covers tax changes here and abroad (as they impact one another), enforcement changes leading to FATCA, changes in access to information, changes in the nature of families, and changes in the frequency of intra-family litigation, then reviews what changes are likely in transition, which will return to "normal," and which changes are here to stay -- and how best to advise in the meantime. > [For more details and to register](#)

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.)

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The Association of Choice for Estate Planning Professionals