

June / July 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, 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

- Updates from the National Office

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



Updates from the National Office

Our heartfelt thanks to the councils that completed an application for the 2018 Council of Excellence Award! We received an increased number of applications this year and are looking forward to announcing the honorees late next month.

We recently completed the 2nd Annual Regional Leadership Day events in California and Washington and they were fantastic! It is surprising how three events structured exactly the same can spark such different and equally-valuable conversations. If you weren't able to join us, [notes can be found on our website](#). The national office wishes to thank all who attended and made these events so beneficial.

[HOT TOPIC] If your council has recently changed officers, please remember to send us an [update form](#) so that we can be sure our records are current and that information like this newsletter is reaching the correct people within your council.

Is your council planning to send an officer to Council Leadership Day? If you are on the fence, this is the perfect year to send someone! The day of activities for council leaders and executives has been revamped from head to toe. Less time in a large room, more time in smaller groups having two-way conversations, breakout sessions you choose – all of these are sure to make the experience all the more valuable for your council's investment. Contact our national office to learn more about the changes.

Ready to register? [Visit our website](#).

[HOT TOPIC] We are excited to have welcomed four new councils (or those returning to membership) during the first half of 2018:

[Estate & Business Planning Council of Hartford Connecticut](#)

Estate Planners Council of Southern Minnesota

Fox Valley Estate Planning Council

[Pioneer Valley Estate Planning Council, Inc.](#)



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

November 6 – 9, 2018 · Ft. Lauderdale

The Annual Advanced Estate Planning Strategies Conference:

- **[HOT TOPIC]** Now has 2 ½ days of technical education
- Educates both councils and their members in a single event
- Provides an enriching attendee experience
- Offers ample networking time intertwined with exceptional multi-disciplinary educational content
- Allows a little more free time to experience Ft. Lauderdale

We hope you are as excited about participating and sharing information about the program with your membership as we are about planning our 55th annual event! For more information, including a full speaker roster and online registration, please visit www.NAEPC.org/conference.

For more information about the pre-conference sessions for council leaders, including notes from the 2017 event, please visit our [website](#). Don't miss this unique opportunity to visit with - and learn from - other volunteer leaders from across the country!

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.

[HOT TOPIC] Next Webinar – This Week!

Natalie B. Choate, Esq., AEP® (Distinguished)

What the Estate Planner Needs to Know about Roth Retirement Plans, including:

Wednesday, July 18, 2018 – 3:00 pm ET

- *Roth basics: Types of Roth plans, tax treatment, who can have one, how to get one
- *Why Roths are a great deal for wealthy clients and some others
- *Who should get a Roth plan and who should NOT
- *Who to name as beneficiary of the Roth plan (and who NOT to name)
- *What your wills and trusts need to say about Roth plans
- *Tax free Roth conversions and other tax saving Roth tips

Natalie Choate is an estate planning lawyer with Nutter McClennen & Fish in Boston. Her practice is limited to advising individuals and fiduciaries about the tax treatment of retirement benefits. Her book *Life and Death Planning for Retirement Benefits* has been called the tax professionals' "bible" on retirement plans. Natalie has lectured in all 50 states; her articles have appeared in *Trusts & Estates*, *ACTEC Journal*, and other professional tax publications. Her comments on estate and retirement planning have been quoted in the *Wall Street Journal*, *New York Times*, and *Forbes*.

> [For more information 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 by 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?

[HOT TOPIC] 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.)

National Association of Estate Planners & Councils

1120 Chester Ave., Ste. 470

Cleveland, OH 44114

(866) 226-2224 - fax (216) 696-2582

admin@naepc.org

The Association of Choice for Estate Planning Professionals