National Association of Estate Planners & Councils

2019 Committee Reports

The Association of Choice for Estate Planning Professionals

Distributed During Council Leadership Day

56th Annual NAEPC Advanced

Estate Planning Strategies Conference

Las Vegas, Nevada

November 5, 2019

56th Annual NAEPC
Advanced Estate Planning Strategies Conference

President's Message
S. Mark Alton, CFP®, ChFC®, CLU®, CAP®, CPWA®

Welcome to The Cosmopolitan of Las Vegas, and to the Advanced Estate Planning Strategies Conference. We are excited that you have decided to invest the time to be here and looking forward to making your experience memorable.

The strength of our association lies with **YOU**, our members. At this conference you'll have ample opportunities to interact with your peers, and with some of the best and brightest speakers, authors, and thought leaders from around the country. Your experience will be whatever you make of it. Please plan to take advantage of everything there is to see and do, and immerse yourself in all the activities and events.

NAEPC has been doing a lot of soul searching lately about what makes our association distinctive and how that uniqueness benefits our member councils, their members, and the Accredited Estate Planner® (AEP®) designees.

First, I believe we are an association of leaders, and many of those leaders attend this conference year-after-year because it's a great opportunity to make new acquaintances and reminisce with old friends. It's also a chance to catch up with those who have demonstrated leadership by earning the AEP® designation, the only graduate-level specialization in estate planning, which extends beyond the requirements of one's primary degree, designation, or discipline. It's also the best time each year to visit with other members of councils who show their leadership by actively contributing to their estate planning council. Council leaders invest their time and share their talents while engaging interactively locally and here at Council Leadership Day or at one of the many Regional Leadership Days. These examples of leadership ultimately contribute to the success of the profession, excellent client service, and stronger communities.

Second, we are all committed to teamwork and working together within multidisciplinary teams. Within "High-Performance Teaming & Professional Collaboration: A Multi-Disciplinary Team Approach to Estate Planning", NAEPC has articulated a model and best practices for initiating and facilitating effective collaboration. This model serves as a guiding star, as well as a lens through which we can view our activities and relationships, and is embraced by those who possess strong leadership qualities. If you have not already read the white paper, I encourage you to do so today. Take this opportunity to speak with others to see how they are integrating collaboration to promote excellence in estate planning.

Third, we share a devotion to lifelong learning. We listen to and learn from one other about how to evolve and grow as professionals, as do the councils with one another. This collaboration at its core is a learning experience, which enables us to address issues and concerns and is how we identify and take advantage of opportunities. This conference is just one of the many ways in which we provide exceptional resources and unsurpassed education.

I believe the essence of what makes NAEPC unique is our relationship with one another, whether those relationships are member to member, council to member, or council to council. Through all, we offer one another support, listen to and learn from one another, and accomplish things together that we simply could not on our own. I know of no better opportunity to realize this benefit than attending and engaging fully here at the conference.

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Advanced Estate Planning Strategies Conference

There is no doubt that your membership in NAEPC provides tremendous value. However, not all of us are taking full advantage of the many opportunities. Following is a list of benefits applicable to councils, members, or both, that you may not have considered, and can learn more about here at the conference:

- Accredited Estate Planner® (AEP®) Designation and the Council Nomination Program
- Council Leadership Day and the Regional Leadership Day Conference
- Council of Excellence Application and Awards Process
- Estate Planning Law Specialist (EPLS) Certification
- Member Benefits
- NAEPC Advanced Estate Planning Strategies Conference
- NAEPC Journal of Estate & Tax Planning
- Robert G. Alexander Webinar Series

We hope you are able to find everything NAEPC has to offer here at the conference. When you do, please don't hesitate to let others know about what an extraordinary opportunity it is.

And finally, I'm excited to announce that our 57th Annual NAEPC Advanced Estate Planning Strategies Conference will be held in Ft. Lauderdale from November 3 – 6, 2020 at the Marriott Harbor Beach Resort & Spa. Please plan now to be there!

Mission Statement

The National Association of Estate Planners & Councils (NAEPC) will promote excellence in estate planning by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education, and recognizing those members within who hold the Accredited Estate Planner® (AEP®) designation and Estate Planning Law Specialist (EPLS) certification.

Vision Statement

The National Association of Estate Planners & Councils (NAEPC) will be the association of choice for professionals engaged in the practice of estate planning. NAEPC will foster the multi-disciplinary approach to estate planning designed to meet the needs of clients at all stages of their lives, with an emphasis on wealth preservation and legacy.

Diversity Statement

The National Association of Estate Planners & Councils (NAEPC) encourages diversity within its membership in support of its mission and vision, and opposes discrimination on any basis which limits the inclusion of those who are professionally qualified, appropriately experienced, and whose reputation and ethics meet the highest standards.

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Volunteers by Committee

Following is a list of volunteers serving NAEPC, listed by committee, as of the date this packet was prepared*.

We are grateful for the support of so many talented and busy professionals each year. Should you wish to become involved with NAEPC, please return the volunteer application found at the back of this packet to the registration desk prior to the conclusion of the conference.

Accredited Estate Planner® Designation Committee

John T. Midgett, Chair
Ginger Fuller Mlakar, Vice-Chair
Hartman Axley
Kathleen J. Belmonte
Thomas M. Borchert
Julie A. Buschman
Philip B. Cubeta
M. Eileen Dougherty
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John P. Garniewski
David Green
Brian K. Kirby
William D. Kirchick
Ryan P. Laughlin
Bronwyn L. Martin
Michael P. Panebianco
Daniel A. Rich
John C. Scott, Jr.
Hal R. Terr
Susan J. Travis
Eido M. Walny
Heather L. Welsh
Shane Westhoelter

Advanced Estate Planning Strategies Conference Committee

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Richard K. MacBarron, Vice-Chair
S. Mark Alton
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Julie A. Buschman
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Jeffrey Richard Hoenle
Ginger Fuller Mlakar
Jordon N. Rosen
Susan P. Rounds
Robert J. Ruelle
Charles B. Sachs
Judith A. Saxe
Hal R. Terr

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Michael P. Panebianco, Vice-Chair
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Paul L. Bechly
Lawrence K. Bogar
Leigh J. Cason
Richard G. Chalifoux
Monique Corigliano
Joshua Didion
Sarah D. Duey
Daniel J. Flanagan
Robert E. Fox
David D. Green
Philip Herzberg
Darcy Houghton
Andrew T. Huber
Harvey A. Hutchinson, III
William D. Kirchick,
Linda J. La Vay
Karen L. Lee Fatt
Lawrence M. Lehmann
Lawrence J. Macklin
Laura J. Malone
Bronwyn L. Martin
Lisa Micka
Christine Anne Myers
Amy E. O'Bannon
Amy C. Permenter
Susan P. Rounds
Charles Bennett Sachs
Stephen F. Starzec
Brent A. Thomas
Paul S. Viren
Eido M. Walny
Shane Westhoelter
Michael Wycklendt
Kim B. Young

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Charles V. Douglas
Todd A. Fithian
Michael B. Karwic
AmandaKoplin
Lawrence M. Lehmann
Mary Katherine Mac Nee
Richard K. MacBarron
Michael Rush Noland
Huldah A. Robertson
Thomas C. Rogerson
Judith A. Saxe
John C. Scott, Jr.
Martin M. Shenkman
Jeffrey M. Turner
John A. Warnick

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S. Mark Alton
John P. Garniewski, Jr.
William D. Kirchick
Clark B. McCleary
Ginger Fuller Mlakar

Publications Committee

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Brian M. Balduzzi
M. Eileen Dougherty
Al W. King, III
Bronwyn L. Martin
John T. Midgett
Michael P. Panebianco
Judith A. Saxe
Martin M. Shenkman

Webinar Committee

Bronwyn L. Martin, Chair
Thomas M. Borchert, Co-Chair
Al W. King, III
Michael Rush Noland

Website & Technology Committee

Eido M. Walny, Chair
Robert P. Goodman, Co-Chair
Remy Carpenter
Jason E. Havens
Christopher P. Jakyma
Dina Land
John C. Scott, Jr.
Jeffrey M. Turner

Our association is always looking for volunteers!
Learn more at http://www.naepc.org/about/volunteering or complete and return the Volunteer Application found on the last page of this packet.

**report prepared October 6, 2019*

National Association of Estate Planners & Councils
1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

NOMINATION REPORT
Proposed Officers and Directors for Calendar Year 2020

Officers		Category	Home State
President	John P. Garniewski, Jr.	Accounting	Delaware
President-Elect	William D. Kirchick	Attorney	Massachusetts
Treasurer	Julie A. Buschman	Trust	Texas
Secretary	John T. Midgett	Attorney	Virginia
Past President	S. Mark Alton	Insurance / Financial Planning	New York

Directors	Category	Home State
Term Ending December 31, 2022		
Harvey A. Hutchinson, III	Insurance / Financial Planning	Alabama
Lawrence J. Macklin	Trust	Maryland
Ginger F. Mlakar	Philanthropic	Ohio
Sahar Pouyanrad	Trust	California
Rachel L. Votto	Accounting	New Jersey
Term Ending December 31, 2020		
David D. Green	Accounting	Washington
Rick MacBarron	Insurance / Financial Planning	California
Mary Katherine Mac Nee	Insurance / Financial Planning	California
Michael P. Panebianco	Attorney	New Hampshire
Susan P. Rounds	Attorney	California
Term Ending December 31, 2021		
Philip B. Cubeta	Philanthropic l	Pennsylvania
Ryan P. Laughlin	Accounting	Wisconsin
Bronwyn L. Martin	Insurance / Financial Planning	Pennsylvania
Susan J. Travis	Trust	Texas
Eido M. Walny	Attorney	Wisconsin

Director Emeritus	Home State
Hartman Axley	Colorado
Martin M. Shenkman	New Jersey

Treasurer's Report

William D. Kirchick, Esq., AEP®, Treasurer

I am pleased to offer this unaudited financial report of the National Association of Estate Planners & Councils.

This report is designed to give our member councils an overview of the financial health of our organization. Just like the local councils we serve, the national organization is dedicated to conservative stewardship of the member dues and fees we receive and services we provide.

The board of directors continues its work to build a reserve of one year of operating expenses, which will ensure that the organization is stable for years to come.

The balance sheet as of August 31, 2019 follows:

Assets	
Cash and Cash Equivalents	$ 873,207
Prepaid Expenses	$ 11,841
Total Assets	$ 885,048
Liabilities & Equity	
Retained Earnings	$ 413,020
Board Outreach	$ 39,355
Net Income	$ 432,585
Total Liabilities & Equity	$ 885,048
Income	
Income AEP® applications and dues	$ 335,289
Website Services	$ 233,700
Council Dues	$ 62,755
Individual Dues	$ 7,460
Leimberg Subscription Services	$ 61,376
Webinar Income	$ 15,905
Other Income	$ 759
Annual Conference Income	$ 261,993
Total Income to Date	$979,237
Total Expense to Date	$548,051
Budgeted Income (projected through the end of 2019)	$ 40,785

As of the date of this report we are on track for a successful year in all areas of the association!

Accredited Estate Planner® Committee Report
John T. Midgett, JD, AEP®, ***Committee Chair***
Ginger F. Mlakar, JD, AEP®, ***Committee Vice-Chair***

The mission of the NAEPC and the Accredited Estate Planner® (AEP®) designation program is to promote excellence in estate planning, professionalism, and the team concept among credentialed professionals. To this end, the AEP® Committee devotes their time to issues specific to governance, support, and promotion of the AEP® designation program.

Some of our efforts this year included:

- Support of the AEP® Council Nomination program and recognition of creative initiatives sponsored by local councils to introduce qualified members to the AEP® designation program - including the $500 "Social in a Box" stipend that assists local councils in sparking interest in the AEP® designation program within their home community.

- Institution of the "Pick 6" initiative to encourage Board Members to recognize and nominate worthy candidates for the AEP® designation.

- An ongoing commitment to furthering recognition of the AEP® designation in the private and public sector.

- A permanent sub-committee continues to review qualifications and requirements for the AEP® designation program. We warmly welcome qualified professionals who have been in active practice for a minimum of five years within the disciplines of accounting, insurance / financial planning, law, philanthropy, or trust services and who hold one or more of the below professional credentials to consider membership. You can learn more about the designation and its requirements at www.naepc.org/AEP. At this time, JD (active law license required if this is the only designation with which one is applying), CPA, CLU®, CFP®, ChFC®, CPWA®, CFA , CAP®, CSPG, CTFA, MSFS, and MST are recognized credentials for eligibility for the AEP® designation.

- Adoption of revised guidelines for the years of experience to qualify for the AEP® designation and slight changes to the application:

    - ✓ Reduce the number of years of experience required for special nominations (board, council, or past president) to 10 years
    - ✓ Maintain the current experience requirements for self-nominating applicants – a minimum of 5 years of experience with successful completion of two graduate-level courses; those applicants with 15 years of experience or more may "opt out" of the coursework requirement
    - ✓ Add a section to the application where applicants are asked to share what the AEP® designation means to them and why they are seeking it; they will provide written text in response to the prompt of "What I believe…" While this section of the application is informational and will not be used to disqualify an applicant, we hope that the responses will help NAEPC learn more about why the designation is meaningful to that individual and the information gathered within these responses may be helpful to NAEPC.

- Adoption of the designation's official value proposition:

    The AEP® designation signifies peer recognition for having achieved advanced knowledge, the highest ethical standards and reputation, and a commitment to working collaboratively with professionals of other disciplines to accomplish each client's goals.

- Support of the editorial board for "The Technical Corner" in the AEP® ALERT. All designees are encouraged to submit an article for publication!

- Speaker selection for the ninth annual exclusive AEP® and EPLS Designee Session: Bill Dedman, Pulitzer Prize-Winning Author and Journalist, *Empty Mansions: The Mysterious Life of Huguette Clark and the Spending of a Great Fortune* www.emptymansionsbook.com.

- Responsibility for selection and nomination of the 2019 class of inductees into the NAEPC Estate Planning Hall of Fame®, created to recognize significant and outstanding lifetime achievement and contributions to the profession of estate planning. We are pleased to induct the following individuals on Thursday, November 7, 2019:

Academic
Neil E. Harl, Ph.D., JD
Mary F. Radford, JD

Accounting
Dirk Edwards, CPA/PFS, JD, MBA
Julie Welch, CPA/PFS, CFP®

Attorney
Jay D. Adkisson, JD
Beth Shapiro Kaufman, JD

Insurance & Financial Planning
Kathleen B. Leipprandt, CLU®, ChFC®, CFP®

Please join us in congratulating these outstanding professionals on their achievement.

- And, finally, responsibility for selection and nomination of the 2020 class of inductees into the NAEPC Estate Planning Hall of Fame®, for induction in November, 2020 at the 57th Annual NAEPC Advanced Estate Planning Strategies Conference:

Accounting
Martin S. Finn, JD, LL.M. (taxation), CPA/PFS
Jordon N. Rosen, CPA, MST, AEP®
Susan M. Tillery, CPA/PFS

Attorney
Steven B. Gorin, JD, CPA, AEP®
A. Stephen McDaniel, JD, AEP®, EPLS
Bruce Stone, JD

Philanthropic Advisor
Kathryn W. Miree, JD

56th Annual NAEPC
Advanced Estate Planning Strategies Conference

Advanced Estate Planning Strategies Conference Committee Report
Lawrence J. Macklin, Esq., CPA, AEP®, ***Committee Chair***
Richard K. MacBarron, JD, CFP®, ChFC®, CLU®, AEP®, ***Committee Vice-Chair***

Welcome to Las Vegas and the 56th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders. We are thrilled to be with you at the beautiful Cosmopolitan of Las Vegas. With the second year of our new program schedule, we are now able to offer additional continuing education and flexibility to enjoy this location.

This year's conference provides even more opportunities to socialize and network with professionals from around the country in a uniquely intimate setting. In addition, you will share with, and learn from, leading experts in the areas of law, accounting, insurance, financial planning, trust services, and philanthropy. Our conference has become well known for the quality of its multi-disciplinary programs, and our speakers are among the best and brightest in the business. You will hear about cutting edge tools and techniques, creative strategies and solutions, as well as industry trends and developments.

Council Leadership Day provides an opportunity to share best practices with other council leaders across the country. Starting with last year, we have redesigned this day to offer more time for conversations with other leaders along with learning pod sessions for hot topics and new ideas for your councils.

All attendees are invited to join us both at the Opening Reception on Tuesday evening, November 5th , in the Exhibit Hall before we begin our two and a half days of continuing education, offering up to 17 hours of CE*, and at the Welcome Reception on Wednesday evening, November 6th, also in the Exhibit Hall. We hope that a short visit with some of our exhibitors will further enhance your professional practice.

If you have not yet pursued the AEP® designation, we will host a concurrent informational session on Friday morning: "The Accredited Estate Planner® Designation Program from A-Z." This program is offered for those interested in learning more about the AEP® designation and will provide an overview of the program and offer an opportunity to have your questions answered by the experts at NAEPC. Please reference your conference "pocket guide" for information about the location and timing of these events, and all events and meeting locations throughout the conference.

Our surveys confirm the value the conference provides, and the benefits that accrue to all attendees. Please help us spread the word, and grow our conference. As always, we are most interested in hearing from you. Many of our best ideas come from attendees and participants so please provide your feedback within a survey that will arrive in your email inbox on Friday, November 8th.

Looking forward to next year, we are very excited to take our program back to Ft. Lauderdale at the Marriott Harbor Beach Resort & Spa. We have committed to a four year rotation between Ft. Lauderdale and Las Vegas and we are excited that this new format enables our attendees to enjoy the continuity of two wonderful and different host cities and hotels.

SAVE THE DATE
57th Annual NAEPC Advanced Estate Planning Strategies Conference
Ft. Lauderdale Marriott Harbor Beach Resort & Spa
November 3 – 6, 2020

**Individual states and/or governing bodies determine the total number of credit hours awarded. Visit www.NAEPC.org/conference for more information.*

Council Relations Committee Report
Kit Mac Nee, CFP®, CRPC® CSPG®, AEP®, ***Committee Chair***
Michael P. Panebianco, JD, AEP®, ***Committee Vice-Chair***

First and foremost, we want to thank all of the dedicated and hard-working committee members who serve as Council Territory Liaisons and reach out to 275 councils each month to share the latest information about NAEPC. These communications go to council leaders and staff executives on record with NAEPC. We welcomed the following individuals to the committee this year:

Philip Herzberg, CFP®, CTFA, AEP® of EPC of Greater Miami (FL)
Russel L. Luna, CLU®, ChFC®, CLTC, AEP®, CDFA™ of Denver EPC (CO) & EPC of Southeast Denver (CO)
Bronwyn L. Martin, Ph.D., MBA, ChFC®, CLU®, CRPC®, CMFC®, AEP®, CLTC, LACP, AIF® of Chester County EPC (PA)
Lisa M. Micka, CFP®, AEP® of Chicago EPC (IL)

One estate planning council has chosen to affiliate with NAEPC during 2019. Please join our committee in welcoming Owensboro Estate Planning Council to our family. Not only did this council join NAEPC, it also became the first to adopt our new Level I website offering!

Regional Leadership Days were held in Bergen County, New Jersey, Atlanta, Georgia, and Denver, Colorado during the month of June. Over 65 individual attended these events and shared amazing ideas and best practices. Locations for next year will be announced soon. Learn more about Regional Leadership Day at http://www.naepc.org/affiliated-councils/regional-leadership-day.

Our Council of Excellence sub-committee continued its work this year, spending time together prior to the release of the application reviewing it and making improvements, which was followed by the review of nearly 30 excellent applications. It is always a great thrill to see what member councils are doing and how they are innovating, and it's also very helpful to learn about the challenges they face. Councils are reviewed using a combination of the check marks completed on the application, which accounts for the most significant percentage of the overall points, as well as the narrative sections and additional information provided with the submission. Please join in thanking those who joined us on the sub-committee for their work; these individuals dedicated hours of their time to meetings and reviewing the applications.

Leigh J. Cason, CTFA
John P. Garniewski, Jr., CPA/PFS, CFP®, AEP®
Harvey A. Hutchinson, III, MBA, M.Acc., JD, LL.M. (taxation), CFP®, AEP®
Linda J. La Vay, CTFA, AEP®
Christine A. Myers, CFP®, CPA/PFS, Mtax, AEP®
Susan P. Rounds, JD, CPA, LL.M. (taxation), AEP®, TEP

It is with much excitement that we celebrate with the following 2019 Council of Excellence honorees:

Small / Extra Small Council
Financial & Estate Planning Council of Huntsville

Medium Councils
Estate Planning Council of Central New York
Spokane Estate Planning Council

Large Council
Financial & Estate Planning Council of Metropolitan Detroit, Inc.

Extra-Large Council
Estate Planning Council of Cleveland

And those councils that were chosen to receive 5-Star Status:

Extra-Small/Small Councils
Estate Planning Council of Bergen County
Estate Planning Council of Riverside County
Estate Planning Council of Suffolk County
Estate Planning Council of the Emerald Coast
Siouxland Estate Planning Council, Inc.

Medium Councils
Central Arizona Estate Planning Council
Greater New Jersey Estate Planning Council
Montgomery County Estate Planning Council
Nassau County Estate Planning Council
Palm Beach County Estate Planning Council

Large Council
Baltimore Estate Planning Council

Extra-Large Councils
Boston Estate Planning Council
Philadelphia Estate Planning Council

Councils that are interested in learning more about the Council of Excellence program and application are encouraged to join the learning pod on Council Leadership Day.

Our committee is always looking for volunteers!
Learn more at http://www.naepc.org/about/volunteering.

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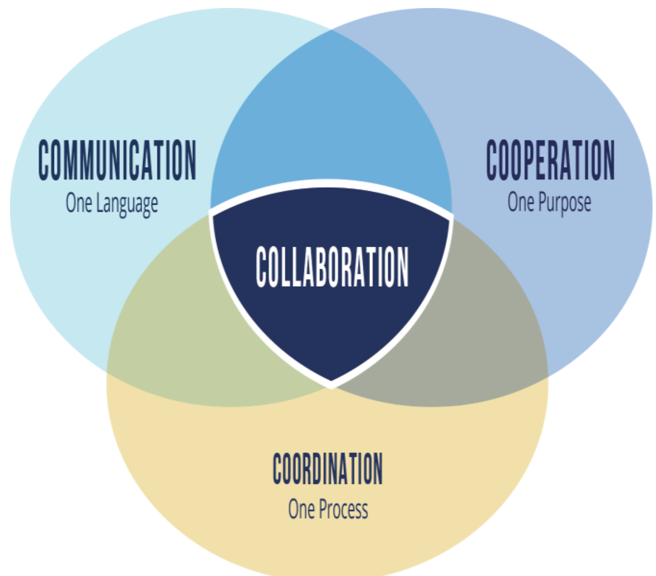
Multi-Disciplinary Teaming Committee Report
Susan Travis, CFP®, AEP®, CTFA, ***Committee Chair***
Philip B. Cubeta, CLU®, ChFC®, MSFS, CAP®, AEP®, ***Committee Vice- Chair***

Achieving and effectively managing team collaboration is at the core of the National Association of Estate Planners & Councils and the Accredited Estate Planner® (AEP®) designees' mission. Helping clients make clear and committed estate & financial planning decisions requires harnessing the collective wisdom of the multi-disciplinary team. More than ever, multi-disciplinary teams must commit to actively engaging in collaboration. To that order, accomplishments this year include the following:



The committee adopted the following value proposition:

> **The Multi-Disciplinary Teaming Committee provides resources to educate, motivate, and equip members to collaborate effectively.**

This value proposition was implemented three ways:

1) The Teaming "Tools" Sub-Committee is working on a flow chart and checklist to guide those who are new to teaming. Committee members Michael B. Karwic, CFP®, AEP®, CRPC®, CeFT and Jeffrey M. Turner, CFP®, CLU®, ChFC®, MBA, AEP® are the leads. Committee vice-chair Philip B. Cubeta, CLU®, ChFC®, MSFS, CAP®, AEP® has assisted.

2) The Case Study Sub-Committee organized "The Melton Case: Climbing the Philanthropic Learning Curve," presented by Philip B. Cubeta, CLU®, ChFC®, CAP®, AEP®, Tony Macklin, CAP®, and Jennie Zioncheck, CAP®, MFT via a *Trusts & Estates* webinar, which was sponsored by NAEPC and the Accredited Estate Planner® designation. The case illustrates the need to include philanthropic consultants in cases involving charitable tools like a foundation or a larger donor advised fund to address family dynamics and effective grant-making. The webinar generated several hundred "warm leads" for the AEP® designation program. For this special program, Philip B. Cubeta, CLU®, ChFC®, MSFS, CAP®, AEP® took the lead and was assisted by committee members Kit MacNee, CFP®, CRPC®, AEP®, CSPG® and Hartman Axley, CLU®, ChFC®, JD, CFP®, MSFS, RHU, AEP® (Distinguished).

3) In addition, the Multi-Disciplinary Teaming Committee as a whole has committed to a series of short vignettes for the NAEPC New Newsletter. The "Collaboration Corner" will illustrate how well teaming can work, or what can be learned from cases in which teaming did not work, or was not used. Three of these cases studies have been submitted with more on the way. Susan Travis, CFP®, AEP®, CTFA has been the lead, enlisting the commitment of all Multi-Disciplinary Teaming Committee members.

The committee will continue these projects in working toward actuation of collaboration.

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Advanced Estate Planning Strategies Conference

Member Benefits Overview

Membership in NAEPC offers councils and their members a wealth of benefits, including "value partners", firms that provide services and products at a discounted price in several categories.

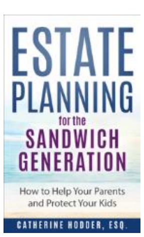
This dynamic and valuable list of value partners is available in one of two places for council members. First, for those councils that have a website hosted through NAEPC, the list can be found right on the local council's website. For those councils that do not have a website through NAEPC, the list can be accessed at http://www.naepc.org/membership/benefits. All members must utilize a user name/password to access a limited number of password-protected ordering links and information. If your council has a website hosted through NAEPC and utilizes passwords, its members can use their local user name and password. 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.

What's new since our last Annual Conference?

Arcadia Art Consultancy is a full-service, tangible asset management firm that specializes in appraisal reporting, advisory, and collection management services for private collectors of fine art and other luxury assets. Uniquely positioned within the realms art, finance, and the law, Arcadia Art Consultancy can handle the most complex matters for high net worth clients.

The firm writes thoroughly researched and well-reasoned appraisal reports for such purposes as charitable contributions, equitable distribution, estate tax liability, gift tax liability, imminent sale, insurance coverage, damage and loss claims, and probate and also provide comprehensive art advisory and collection management services to help private collectors effectively buy, manage, and sell impressive collections of fine art and other valuables.

NAEPC members receive a 12.5% discount on professional services. Interested members can either complete a new client form at www.arcadiaappraisals.com/naepc-member-benefit or email kaitlyn@arcadiaappraisals.com, referencing the NAEPC discount in the email.



Estate Planning for the Sandwich Generation: How to Help Your Parents and Protect Your Kids, debuted as the #1 Amazon bestseller in new releases for Wills/Estate Planning. It features 10 estate steps to create an estate plan, ***why it is critical to use an estate planning attorney***, and 5 talks to have with your parents about the future.

This book addresses frequently asked questions, walks clients through the estate planning process, and affirms the clients' decision to work with an estate planning attorney. Additionally, the book highlights 5 important discussions to have with aging parents regarding finances, medical concerns, aging, end-of-life care, and death. Use this book as a marketing tool for your practice! Hand the book to prospective clients as an introduction to your estate planning services or give the book as a meaningful thank you to clients for their business.

NAEPC members receive a 20% discount off the cover price of $14.99 plus FREE shipping by emailing catherine@hodderink.com. Orders of 50 books or more receive a 25% discount off the cover price and FREE shipping!

The *Journal of Financial Service Professionals*, the official publication of the Society of FSP and considered by many the most valuable benefit of membership in FSP, is now available to members of NAEPC at a special discounted price.

Each issue of the Journal delivers impactful information and results-oriented content you can apply in your practice immediately, including a column dedicated exclusively to estate planning topics. Contributors to the Journal are thought leaders and experts from the entire spectrum of financial services, reflecting the nature of your practice—which requires a collaborative, multidisciplinary approach to deliver the highest level of client service possible. Enjoy the Journal's superior content in your choice of format; your subscription includes the print edition, online version, and digital edition which is designed to be read from your smartphone or tablet.

Subscribers to the Journal receive tremendous value: six issues per year, a study/discussion guide for each one, free access to programs based on Journal content, and access to archived issues going back to 2007. ***As a NAEPC member you get all those benefits at a 20% discount—just $104/year.***

Take advantage of this opportunity to put cutting-edge knowledge to work for your clients now. You can subscribe here, or call 800-392-6900 (M-F, 8:30am-4:00pm ET) and tell FSP you're a member of NAEPC who wants to subscribe to the Journal.

Leading Response is the largest data-driven marketing services company, providing targeted print advertising, social media marketing, and digital advertising to boost client acquisition for estate planning attorneys.

Having marketed close to 600,000 consumer-focused events, the Leading Response seminar event marketing program has generated over 17,500,000 consumer reservations and 800-1,200 campaign mailings per month. The success of the Leading Response social media event marketing is fueled by a second-to-none "look-alike" database of over 112 million consumer contacts. Because of this, clients are assured to get in front of the qualified prospects in their area who need their services. The Leading Response team prides itself on not only having unique industry insight from 25 years of event marketing, but world class consulting and customer service as well.

NAEPC members and members of affiliated councils are eligible for a 5% discount on all marketing products and services, including direct mail and digital marketing services.

Contact Josh Danielson, National Marketing Consultant, at 813-885-8231 or josh.danielson@rme360.com to get started. Make sure to mention NAEPC!

Lorman Education has been educating professionals for over 32 years and understands the need for concise, accurate and timely information on regulations, laws, and business changes.

NAEPC members are eligible for a $449 discount on the All-Access Pass for CLE training and/or a 30% discount on individual live or on-demand webinars.

The All-Access Pass is a 12 month online training membership. With it, subscribers will get unlimited access to all of Lorman's training products including videos, slide decks, written materials, and live and on-demand webinars.

To order an All-Access Pass, visit http://www.lorman.com/pass. Other training options can be purchased at http://www.lorman.com/training. Please use Priority Code 19189 and Discount Code T1275547 when ordering.

At MileMark Media, we exclusively build law firm websites. We utilize our extensive industry knowledge, incorporate dynamic strategies from our dozens of studies on optimizing conversions and implement best practices that support our findings. We are the best of both worlds when it comes to internet marketing and legal marketing, let us build you the perfect law firm website.

MileMark Media offers NAEPC members a 10% discount on all website and marketing packages. Use discount code "NAEPC" or mention you came from the NAEPC website when contacting us to receive the discount. We have worked with numerous estate planning law firms to grow their business, contact us today at https://www.milemarkmedia.com/contact/ or by emailing Vincent M. Tittel directly at vince@milemarkmedia.com.

Learn more about all of NAEPCs member benefits at http://www.naepc.org/membership/benefits.

Publications Committee Report

Susan P. Rounds JD, CPA, LL.M., AEP®, TEP ***Committee Chair***, ***Committee Chair***
Ryan P. Laughlin, CPA, MST, JD, AEP®, ***Committee Co-Chair***

This was a very busy year for the NAEPC Publications Committee. The committee eagerly adopted not only three, but four goals for the *NAEPC Journal of Estate & Tax Planning*, our flagship publication with a mission to maintain a best-in-class library of thought leadership curated for the estate planning professional. While this mission is currently being reviewed, we do believe it accurately captures the spirit of the publication and the wealth of information included within current and past issues. Our 2019 goals are:

1. Consider acquiring submissions from individuals interested in becoming an author using Martin Shenkman's offer to assist.
2. Decide upon a vetting process.
3. Encourage a focus on diversity.
4. Finalize submission guidelines.

September 2019 Online Writing Workshop for the *NAEPC Journal of Estate & Tax Planning*
Hosted by Martin Shenkman, CPA/PFS, MBA, JD, AEP® (Distinguished)

Goal 1 is well underway with a collaborative article currently being drafted with committee and board member Martin Shenkman's leadership. Marty has graciously offered his time to work with five individuals, including Publications Committee members. We will be working to expand on this goal to encourage young authors and councils to submit articles from their members. This concept could also be applied at the council level to assist in increasing the number of next-gen members or by encouraging multi-disciplinary teams of council members to author articles for their council for publication in the Journal.

Vetting

Goal 2 is progressing as well. Debatable articles are circulated among Committee Members and discussed on our committee calls. So far we have rejected one such article and have chosen to include another.

Requests for Submission

Publication Committee members are asked to submit articles of interest for consideration in advance of each new issue. This has been successful in generating a variety of topic areas which fosters goal 3, a focus on diversity.

Expanded Disclaimer Language Adopted

"The opinions expressed in this publication do not necessarily represent the opinions of NAEPC, its Officers, Board of Directors or its various committees. NAEPC does not provide legal, tax, accounting or financial advice and these materials are published solely to provide a diversity of thought and information on topics involving wealth planning, tax, estate and gift planning, estate and trust administration and philanthropy."

Journal Page Update

A revision to the look and feel of the Journal website is underway and we are eager to align it with the look and feel of the association's primary website, www.NAEPC.org. In addition, we are hoping to make it easier for readers to view the contents to encourage readership of numerous articles.

AEP® Top Pick

Authors whose articles are chosen as the AEP® Top Pick receive a written letter of congratulations. Martin Shenkman's articles have consistently won the AEP® Top Pick award and this year we were excited to welcome another author into the winner's circle:

Income Tax Planning Using Estate Planning Techniques
This article provides a comprehensive review on dual purpose planning strategies, including key diagrams and financial illustrations.
Author: S. Stacy Eastland JD, AEP® (Distinguished)

This short lived streak was soon followed by another winner from Marty!

Estate and Tax Planning Roadmap for 2019-2020
The authors clear a strategic path through our new planning landscape and illustrate techniques to traverse potential detours along the way. Reproduced courtesy of Leimberg Information Services, Inc. (LISI)
Authors: Martin M. Shenkman, CPA/PFS, MBA, JD, AEP® (Distinguished), Jonathan Blattmachr, Esq., AEP® (Distinguished), Joy Matak, JD, LL.M., and Sandra D. Glazier, JD

Key Metrics

The most recent issue enjoyed an open rate of 24.40%, which is our highest to date and represents an increase of close to 1% over the previous issue. We have instituted a new "In Case You Missed This" announcement that comes out one to two weeks following the initial release of each new Journal as a test run. We will track the open rate on the second announcement to determine if the follow up email is valuable.

Activity for the most recent quarter reported includes 69,433 sessions and 43,159 page views. At close to 70,000, we have broken our own record for sessions. To date this year we have met last year's goal of exceeding 90,000 sessions.

Another Great Year!

The excellent and engaged committee welcomed a new Co-Chair, Ryan P. Laughlin, CPA, MST, JD, AEP® at the beginning of the year. We would also like to share a special thank you with all board members who share articles of interest, to the Publications Committee members for their time and innovative thinking, to our webmaster, Bruce Newburger, for his invaluable experience and guidance, and to Eleanor M. Spuhler for her patience, support and good cheer, hurricanes not withstanding!

56th Annual NAEPC
Advanced Estate Planning Strategies Conference

Robert G. Alexander Webinar Committee Report

Bronwyn L. Martin, MBA, ChFC®, CLU®, AEP®, CLTC® CRPC®, CFS®, CMFC®, AEP®, LACP, AIF,® ***Committee Chair***
Thomas M. Borchert, CLU®, ChFC®, AEP®, CLTC, MA, LUTCF, ***Committee Co-Chair***

The NAEPC Webinar Committee has completed six years of monthly webinars; bringing to our designees, member councils, and their members "the best of the best, of the best" in speakers and topics, as prescribed by its originator, Robert (Bobby) Alexander. The committee members, listed at the beginning of this packet, have done an excellent job and committed a great deal of time and energy to making the program compelling and successful. We continue to look for ways to increase attendance and subscribership and look forward to developing strategies to expand our support to local professionals.

The list of outstanding estate planning professionals who have volunteered their time and expertise is quite remarkable. NAEPC has created one of the finest archives of professional estate planning content available anywhere. We thank all of you, especially our volunteer presenters, for your interest, involvement, and support.

The one-hour webinar programs are typically offered monthly on the 2nd Wednesday at 3:00 pm ET, excepting the November conference month. Nearly all webinars are archived for playback at the listener's convenience. They have become a favorite for many councils as a group learning/discussion activity that often allows the members to hear from experts who are otherwise difficult and sometimes impossible to schedule for a local event. It is also possible to arrange satellite locations to facilitate such local presentations.

Continuing education credit is best made available when local councils apply for credit within their home state (or for the various governing bodies) for programs hosted in a group setting or when individual attendees are able to self-file. Of course, continuing education credit for the Accredited Estate Planner® (AEP®) designation is available at nearly every webinar.

The single-event registration fee is only $40 per session for Accredited Estate Planner® designees whose dues are current, $60 for members of an affiliated local estate planning council or at-large members of NAEPC, $100 for individual non-members, and $250 for a council meeting or group gathering for councils whose annual dues are current. Periodically throughout the season special webinars are also provided at no cost.

Discount Subscriptions

Discounts are available to individuals and councils preferring to make a single payment for the entire year of webinars which can be viewed at the subscriber's convenience or on the live date and time. Savings are significant! You can easily subscribe for the season on our website.

Final 2019 Program

Our final webinar for 2019 will be on Wednesday, December 11, 2019 from 3:00 pm – 4:00 pm ET with Cynthia L. Hutchins, CRPC, CIMA speaking on Longevity.

Looking Ahead

The committee is hard at work developing a schedule for events for the coming year that is relevant and timely. Just as in prior years, you can expect to hear from the leading experts in our profession who will share their thoughts on important and cutting-edge topics. Please let our national office know if you'd like to be first on the list to receive notification of the 2019 schedule.

Our webinar series for 2020 is scheduled through June. Please visit us at naepc.org/events/webinar to view the schedule and register.

56th Annual NAEPC
Advanced Estate Planning Strategies Conference

Website & Technology Committee Report
Eido M. Walny, JD, AEP®, EPLS, ***Committee Co-Chair***
Robert P. Goodman, CPA, AEP®, CFP®, ***Committee Co-Chair***

We thank our affiliated local councils, and particularly those that subscribe to our website services, for another exceptional year!

The Website & Technology Committee is a committed and hard-working group of individuals that comes together to serve NAEPC's members and councils in the best manner possible and allows the association to be a central point of communication with councils and their members, the national association, the public, and other interested parties. The bond with the designees and the councils and their members continues to strengthen through collaboration.

We continue to hit new records with regard to the number of councils subscribing to the website platform, both large and small, and more councils continue to see the benefit of moving to our more sophisticated level IV platform.

The affiliated councils remain the primary source for new features and enhancements to the system as the committee enhances and improves the website and its features and functionality. For many subscribers, the website is the sole source of local member data and the administration "hub" for their council, so we consistently add features that enhance efficiency for this purpose. The value of the website service continues to be competitive in the marketplace and an overwhelming favorite in terms of value. We also continue to prioritize security in all that we do.

The committee is constantly working on ways to improve the interaction with members via the website and also improve the overall website experience. Here is a snapshot of some of the new features we've implemented since the last annual conference:

- Added a new Level 1 website service platform.
- Scheduling of email and text communications.
- Broadcast texting.
- A new form that allows guests to join the council's mailing list.
- More compact formatting for the Document Library page.
- Conversion of all council websites to HTTPS, which is important in our efforts to keep council sites in PCI compliance.
- Administrative functions to cancel duplicate or unfinished renewals and applications.
- Improved matching of RSVPs and Renewals to members that did not log in to complete these transactions.
- New revenue reporting features that shows transactions by date period.
- Ongoing monitoring and action with PCI Compliance needs related to credit card processing.
- Redesign of the *NAEPC Journal of Estate & Tax Planning* website to be mobile friendly and more administrable.

We are extremely grateful for our long-serving webmaster, Bruce Newburger, and trust you will enjoy his learning pod sessions on Council Leadership Day. Also please thank the entire committee as you see them throughout the conference; the list of all members can be found at the beginning of this packet.

For more information about council website options and functionality, please visit http://www.naepc.org/affiliated-councils/website-packages.

National Association of Estate Planners & Councils
1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

National Association of Estate Planners & Councils
Committee Volunteer Application

NAME____

Primary Professional Discipline: ___Attorney ___Accountant ___Insurance/Financial Planning
___Trust ___ Philanthropy

Designation(s) held ___AEP® _____EPLS ___ CFP® ___ChFC® ___ CLU® ___CPA ___JD ___ CTFA

Please List Other Designation and/or Degrees ____

FIRM/COMPANY____

ADDRESS____

____

TELEPHONE (Business)_______________________(Cellular)______________________________

Email________________________________

I am a member of the ____Estate Planning Council.

I am current on all continuing education requirements required by all degrees/designations held ___Yes ___No

List Professional/Trade Organizations to Which You Now Belong in Addition to NAEPC:

____
____

Committee Interest (check all that apply)

_____Accredited Estate Planner® Designation *(*meets monthly on the 3rd Monday at 2:00 pm ET)
Responsibilities: designation program maintenance & growth, must be a current designee

_____Annual Conference (meets monthly on the 4th Monday at 4:00 pm ET)
Responsibilities: program development, fundraising for upcoming annual conference & general event policy

_____Council Relations (meets monthly on the 4th Thursday at 11:00 am ET for approximately 30 minutes)
Responsibilities: affiliated local council retention & growth within territory structure, promotion of benefits, programs & services for council consumption

_____ Multi-Disciplinary Teaming (meets approximately every other month on the 2nd Thursday at 2:00 pm ET)
Responsibilities: oversight of projects & materials related to the team concept of estate planning

_____ Publications (meets quarterly, schedule changes each year)
Responsibilities: oversight of the NAEPC Journal of Estate & Tax Planning

_____Robert G. Alexander Webinar Series (meets approximately 5 times per year on the 3rd Thursday at 2:30 pm ET)
Responsibilities: programming and oversight for webinar series

_____Website & Technology (meets quarterly on the 3rd Tuesday at 10:30 am ET)
Responsibilities: development of affiliated local website solutions, www.naepc.org, oversight of association's social media strategy, and varied committee requests

Committee placement subject to availability and leadership approval. Meeting dates and times subject to change.