

June 2014

## National Association of Estate Planners & Councils Minute

### *...the monthly administrative report for affiliated local council leaders*

(This email is being sent to you as an **officer on record** or **administrator** for your NAEPC-affiliated local estate planning council, all officers on file receive the email. You are encouraged to share part or all of this publication with your entire membership. *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 online at <http://www.naepc.org/events/news>.)

**Please share this publication with your entire board at the next council board meeting.**

**July 1<sup>st</sup> Alert:** 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 at [http://www.naepc.org/assets/national/pdf/council\\_officer\\_form.pdf](http://www.naepc.org/assets/national/pdf/council_officer_form.pdf).

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#### **2014-2015 No-Charge Speaker Program Available ·**

Each year, a variety of speakers are made available to NAEPCs affiliated local councils at no charge (council must fund travel, lodging and meeting expenses as outlined within the informational packet). This benefit has been wildly successful since its inception and we are pleased to provide the packet for the 2014-15 fiscal year below.

[2014-15 Fiscal Year Informational Packet](#)

The kit offers a biography and topic choice(s) for each presenter, as well as their availability. All presentations will be assigned on a first come, first served basis so ACT FAST! Don't miss the chance for your council to take advantage of this exciting program! After submitting your request via fax to (216) 696-2582 or [eleanor@naepc.org](mailto:eleanor@naepc.org), a representative will phone or email the council contact noted with the outcome of the request (available or not available). If the speaker is available, a representative will supply council contact with address and telephone information for the speaker.

#### **Nominations Open Through July 11, 2014 ·**

The NAEPC board of directors greatly reflects the individual estate planning councils and their 28,000 members. The current board seeks your help in identifying potential leaders for the national board of directors.

As one of the officers of your estate planning council, you have had the opportunity to work closely with a number of individuals who have demonstrated leadership qualities, not only through your council, but also through other

professional and civic organizations. We would like to ask you to take the time to contact these persons and ask if they would be willing to serve their profession as a possible future NAEPC board member. If so, please submit their name and other information on the NAEPC board nomination form, which can be obtained by emailing [admin@naepc.org](mailto:admin@naepc.org). Feel free to nominate more than one candidate, and please consider submitting yourself as a candidate if you wish. Generally, although not mandatory, the ideal candidate is either a past president or current officer of your affiliated local council and has demonstrated leadership in other professional organizations or endeavors. Ideally, they would also have attended at least two annual conferences and have served on one or more committees of the NAEPC. Thank you!

### **July 1, 2014 Discount for New or Upgraded Website Service through NAEPC ·**

NAEPC offers [websites with varying capabilities](#) to our affiliated local councils and currently nearly 60% of all councils are using them! This is a great time of year to consider starting or upgrading your service. In addition to a 50% new or upgraded service discount 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 1<sup>st</sup>. Your council can have a website up and running for as little as \$200 this year! [Contact](#) our office today for more details!

### **July 9, 2014 Webinar ·**

Information about the next webinar in the Robert G. Alexander Webinar Series has been provided below; please consider copying and pasting the text into a new email for your entire membership. Those councils that utilize a website platform hosted by NAEPC can now forward the webinar (appearing in your calendar as a national event) the same way council events are forwarded – take a look today!

Wednesday, July 9, 2014  
3:00 pm - 4:00 pm ET

### **"Family Investment Partnerships: Structure, Design, Issues & Problems (Beyond the Valuation Discount)"**

Paul S. Lee, JD, LL.M., AEP® (Distinguished) Nominee

[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. Councils may also file the program in their home state for programs offered in a group setting.

### ***Registration Fee***

- \$40 / Accredited Estate Planner® designee (dues must be current at the time of registration)
- \$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 (council dues must be current at the time of registration)

### ***Upcoming & Past Programs***

The full list of upcoming and past programs can be found at <http://www.naepc.org/events/webinar>. Past programs are available for purchase at the live registration rate.



**51<sup>st</sup> Annual Conference ·**



November 5 – 7, 2014  
San Antonio, Texas

Have you seen the fantastic line-up of speakers for the technical education portion of the 51<sup>st</sup> Annual Conference?

#### **Thursday, November 6, 2014**

- Robert S. Keebler, CPA, MST, AEP® (Distinguished) · 15 Best Planning Ideas for 2014 and Beyond
- Todd A. Fithian · The True Frontier of Estate Planning: Effective Collaboration
- Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP® (Distinguished) Nominee · Planning for an Aging Population: Your Clients, Your Parents, and Someday You!

#### *Repeated Breakout Sessions*

- Susan T. Bart, JD · Decanting: Refining a Vintage Trust
- Elizabeth L. Morgan, JD · Life Insurance, Annuities, and Captive Insurance as Tools for Domestic and International Estate & Tax Planning
- Thomas Rogerson · Family Communication, Values, Mission, Philanthropy - How Do You Help a Client Get Started?
- Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished) · Hot Income Tax Tips for Estate Planners

#### **Friday, November 7, 2014**

- Jeffrey N. Pennell, JD · Annual Update
- Lee J. Slavutin, MD, CLU®, AEP® (Distinguished) Nominee · Tax Traps Involving Life Insurance
- Jerome M. Hesch, JD, AEP® (Distinguished) · Reality of Sale: Dealing with the 10% Myth for Seeding Installment Note Sales to IDGTs and BDITs
- Jonathan G. Blattmachr, Esq., AEP® (Distinguished) · Supercharged Shelter Credit Trust vs. Portability: It's Not that Complicated to Choose the Best
- S. Stacy Eastland, JD, AEP® (Distinguished) · Some of the Best Charitable Planning and Estate Planning Ideas We See Out There in the New 2014 Tax Environment©
- Stanley M. Johanson, JD, LL.M., AEP® (Distinguished) · Recent Developments Affecting the Estate Planning Practice

To learn more about the 51<sup>st</sup> Annual Conference, please visit <http://www.naepc.org/conference>. Please consider sharing this information with your entire membership as well!

#### **Best Practice Tidbit ·**

Is your council in need of sample bylaws or articles of incorporation? Look no further than our handy [sample documents!](#)

Looking for additional best practices and tidbits? Visit the "[Referral Lists](#)" page of the website built just for you – council leaders!

#### **Member Benefits, Programs & Services Recap ·**

Members of the National Association of Estate Planners & Councils and members of your affiliated local council have access to a wide array of benefits, programs & services 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 benefits 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**

### **American Bar Association RPTE Paralegal eLearning Program**

The [ABA Section of Real Property, Trust and Estate Law](#) is proud to continue its professional development series focused on paralegals, legal assistants, and others working in the areas of Trust & Estate Law. This program is co-sponsored by the [ABA Standing Committee on Paralegals](#).



Attendees of the Paralegal eLearning Program will learn substantive legal and ethics issues, as well as best practices, from leading industry professionals with in-depth knowledge and hands-on experience in Trust & Estate Law. The program includes ten 60-minute webinar sessions, and attendees can register for the entire series or individual sessions. **Those who sign-up for the entire series after it begins will be registered for the remaining webinar sessions and receive recordings of the sessions that have already occurred.**

For full program information, please click [HERE](#).

*Attendees will receive a certificate of course completion at the conclusion of each webinar session. Attendees attending all ten sessions will receive an additional certificate of series completion. Neither certificate bears state licensing approval. However, attendees may choose to self-report their participation depending on their relevant jurisdiction(s). Attendees are encouraged to contact individual state licensing agencies directly with questions.*

NAEPC is pleased to offer this benefit through a relationship with the RPTE section of the American Bar Association provided by the [Synergy Summit](#). The Synergy Summit is a unique organization whose delegates come from the leadership of the major legal, accounting, and financial service organizations in the country, including two sections within the ABA, two sections within the American Institute of Certified Public Accountants, the National Academy of Elder Law Attorneys, the National Association of Estate Planners & Councils, the Society of Financial Service Professionals, the American Association of Attorney-Certified Public Accountants, the Partnership for Philanthropic Planning, and the Society of Trust and Estate Practitioners. The Synergy Summit, as its name implies, is a unified think tank allowing the leaders of its constituent organizations to coordinate programs, compare notes, and offer more value to their respective members. These organizations together represent more than 200,000 lawyers, accountants, financial planners, and insurance and other professionals.

### **Cloudia Assistant**

Commissions are down. Expenses are up. It's time to start being frugal and increase profitability... the days of waste are over. Stop overpaying for overpriced:

- CRM's bloated with features you'll never use
- Drip Marketing programs that are difficult to configure and use



- Automatic Commission Calculation systems
- Lead Tracking systems
- Training & Support
- QUOTE ENGINES that are limited in what they actually quote

Now you can get Cloudia Assistant, the top CRM created by an insurance company for insurance agents and agencies, for only \$29.99 per user per month. Cloudia Assistant includes the most powerful and easy to use drip marketing system available, automated commission calculation system, lead tracking, free training and support, and, if you mention you were referred by NAEPC, you will get our quote engine absolutely free until July 4, 2015. Also, our quote engine quotes more than you think:

- Health
- Dental
- Indemnity
- Short Term
- Accident
- Critical Illness

That means you can quote package deals for your customers covering all their needs in one shot. Cloudia Assistant is so focused on your success that it will even text you when your client has reviewed the quote so you can act fast to respond while they are in the frame of mind to buy insurance.

Get Cloudia and get affordability, ease of use, a quick learning curve, free support and a free quote engine for more than a year. There is not a better value for insurance people anywhere!

Call 817-778-4508 or e-mail [info@cloudiaassistant.com](mailto:info@cloudiaassistant.com) for more information, demo or [Click Here to Sign-Up](#) for a free 15 day look. Please place "NAEPC" in the field asking for your referral.

### **I-ASK (International Association of Story Keepers)**

I-ASK is a network of Certified Legacy Planners, estate planners and wealth managers dedicated to educating families about the value of holistic estate planning. Members team up to provide educational seminars, focusing on the valuables and the values side of estate planning, differentiating them in the marketplace.



I-ASK members provide advice and assistance to individuals and families in [LegacyStories.org](http://LegacyStories.org), a family history web library, offering everything needed to organize, preserve and pass down a durable legacy portfolio.

I-ASK Professional Membership is \$149/year and includes:

- Listing in the [LegacyStories.org](http://www.legacystories.org) expert directory: <http://www.legacystories.org/>
- Licensed marketing collateral and presentation videos
- Live holistic estate planning educational and marketing webinars
- Legacy Vault for cloud-secured legacy portfolio storage
- Discounts on legacy-builder toolkits and other products and premiums
- Networking with members for reciprocal client referrals
- Learn more here: <http://www.legacystories.org/about/estate-planner>

NAEPC members are entitled to a 20% discount on their I-ASK Membership. For security reasons, coupon codes change frequently. Please send coupon requests to [support@LegacyStories.org](mailto:support@LegacyStories.org) and include your name, phone number, and the name of your affiliated local council.

### **Existing Benefits**

Acquire Direct Marketing  
Advisys  
American Dream Planner LLC  
Amicus Creative Media  
BizActions LLC  
Business Valuation Resources, LLC  
Cards for a Cure  
CBData™  
Charitable Planning Desk Reference for Advisors offered by Strategic Philanthropy  
Cloudia Assistant  
CrummeyService  
DocuBank  
Estate Planning Smarts / Pensworth  
EstatePlanningBinders.com  
Family Business Magazine  
Fiserv Investment Services  
Florida Domicile Handbook  
Heart2Heart Workbook & Deck of Cards, Discuss Directives, LLC  
International Association of StoryKeepers (I-ASK)  
International Genealogical Search Inc.  
Klark Proposal Software  
Konica Minolta Business Solutions  
Lawgic, LLC  
LegacyQuest, LLC  
Legal Binders Now  
Legal Vault  
My Perfect Will  
My Personal DataSafe LLC  
NationalUnderwriter.com  
Oswald Companies Personal Excess Liability  
Private Wealth magazine  
Ruby Receptionists  
Sterling Cut Glass  
The ABA Checklist for Family Heirs... / ABA Book Publishing  
The Ultimate Estate Planner  
Trusts & Estates  
Veracity – MTG (payment processing solutions)  
WealthManagement.com  
Wolters Kluwer Law & Business

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.

**LinkedIn Sub-group for Council Leaders ·**

NAEPC has launched a sub-group of the general association group on LinkedIn, just for council leaders. Join today to interact with other council leaders from across the country and to receive weekly posts from NAEPC! The sub-group is available only to officers and directors of affiliated local estate planning councils. See you there ~

**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 at

[http://www.naepc.org/assets/national/pdf/council\\_officer\\_form.pdf](http://www.naepc.org/assets/national/pdf/council_officer_form.pdf).

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*The Association of Choice for Estate Planning Professionals*