

June 2015 Issue

National Association of Estate Planners & Councils Minute

· the monthly administrative report 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 share this publication with your entire board at the next council board meeting or forward it via email if a meeting is not scheduled soon.

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Website Options, Now is the Perfect Time!

NAEPC offers a variety of continually-enhanced website platforms for your affiliated local council with varying capabilities.

- A Level 2 site offers basic pages and features: a calendar of events, document library, sponsor options, and an email communication system.
- The Level 3 site builds on these features and adds a secure event RSVP and additional sponsor options.
- The Level 4 site offers everything the other two options do, but builds in a secure payment processing system after you've secured a merchant account.

This really is just a sampling of the features, a detailed list can be found online at <http://www.naepc.org/affiliated-councils/website-packages>, take a look today!

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 1st. Your council can have a website up and running for as little as \$200 this year! Contact our office today for more details, 866-226-2224 or councilservices@naepc.org!

Council Nominated AEP® Program, \$500 Stipend Available

All NAEPC-affiliated councils hold the special honor of nominating eligible candidates to receive AEP® designation! Councils with 100 members or less are permitted to nominate one candidate in each discipline plus one in any of the four disciplines for a total of five nominees annually and councils with 101 members or more may nominate two candidates in each discipline plus two additional in any of the four disciplines for a total of ten on an annual basis. The council must submit a board of director's nomination resolution signed by the current president and one additional council officer. As a special benefit to the applicant, the application fee for council-nominated AEP® designation candidates is 50% of the regular application fee, or \$150, and must be accompanied by the \$150 annual dues at the time of application.

All applicants must:

- Hold one or more of the following degrees, licenses or certifications in active status: JD, CPA, CLU®, ChFC®, CFP®, or CTFA; and be actively practicing in one of the following disciplines: accountant, attorney, insurance and financial planner, or trust officer
- Be presently and significantly engaged in estate planning activities, including the accumulation, preservation, and transfer of wealth through proper planning
- Have a minimum of fifteen years of professional experience as an estate planner
- Continuously maintain membership in an affiliated local estate planning council and remain in good standing with all respective professional organizations and licenses
- Sign an applicant declaration agreeing to continuously abide by the NAEPC Code of Ethics and remain committed to the team concept of estate planning
- Complete a minimum of thirty hours of continuing education, at least fifteen of which must be in estate planning every twenty-four months

NAEPC is pleased to offer an incentive to those councils that choose to host an informational event where the council invites qualified members or those whom they would like to nominate for the AEP® designation. To further assist in this process, the NAEPC will reimburse your council for expenses of up to \$500 to host this event! Our administrative staff stands ready to assist you in developing a program based on successful events sponsored by other affiliated councils. We hope you will take advantage of this unique opportunity by contacting Susan Austin-Carney, NAEPC designation administrator, at 866-226-2224 or susan@naepc.org. Councils must speak directly with Susan Austin-Carney and complete a very brief commitment form prior to hosting an event. Susan also stands ready to assist any council that wishes to discuss best practices with regard to using the program.

July 8, 2015 Webinar, Please Share with Members

Wednesday, July 8, 2015 3:00pm - 4:00pm ET

Your Clients May Not Be Cyborgs But You Still Must Plan for Their Digital Assets

Gerry W. Beyer, JD, LL.M., JSD, AEP® (Distinguished) Nominee

This beginner presentation focuses on the developing area of "digital assets," electronic records ranging from e-mail accounts to banking, investment, and shopping accounts, domain names, social networking sites, and online games. Prof. Beyer will offer guidance on the utility of comprehensive planning for digital assets and will discuss issues that affect this set of assets, offer estate planning options, analyze existing laws, and explore current and future trends in this area.

Gerry W. Beyer joined the faculty of the Texas Tech University School of Law in June 2005 as the first holder of the Governor Preston E. Smith Regents Professorship. Previously, Prof. Beyer taught at St. Mary's University and has served as a visiting professor at several other law schools including Boston College, The Ohio State University, Southern Methodist University, the University of New Mexico, Santa Clara University, and La Trobe University (Australia). He is the recipient of dozens of outstanding and distinguished faculty awards including the Chancellor's Distinguished Teaching Award, the most prestigious university-wide teaching award at Texas Tech. Prof. Beyer was also the recipient of the 2012-2013 Outstanding Researcher Award from the Texas Tech School of Law. As a state and nationally recognized expert in estate planning, Prof. Beyer is a highly sought after lecturer. He presents dozens of continuing legal education presentations each year for many state and local bar associations, universities, and civic groups. Prof. Beyer is the editor of the most popular estate planning blawg in the nation which for the past five years has been named to the ABA Journal's *Blawg 100*. He has authored and co-authored numerous books and articles focusing on various aspects of estate planning, including a two volume treatise on Texas wills law, an estate planning casebook, and the Wills, Trusts, and Estates volume of the Examples & Explanations series. He has three times won awards from the American Bar Association's Probate & Property magazine for his writing and is one of the most often downloaded law authors on the Social Science Research Network. He is currently the Editor-in-Chief of the *REPTL Reporter*, the official journal of the Real Estate, Probate and Trust Law Section of the State Bar of Texas. Prof. Beyer serves as a mentor to many students and various law school organizations as well participating regularly in pro bono activities. He is the advisor for the Estate Planning and Community Property Law Journal and its annual seminar. Professor Beyer received his JD from The Ohio State University and his LL.M. and JSD. degrees from the University of Illinois. He is a member of the Order of the Coif, an Academic Fellow of the American College of Trust and Estate Counsel, and a member of the American Law Institute.

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

Registration Fees

\$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)

Councils may also choose to use a webinar as a creative programming option. The council can choose to host the program when it airs live or purchase a past program to use on-demand. It's as simple as securing a room and internet connection with sound and inviting members to attend! Contact the NAEPC office with questions or to get started! This is the perfect solution for brown bag luncheons and can even be sponsored - try building one into your 2015-16 program schedule.

NAEPC Collecting Formation Date for all EPCs

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 eleanor@naepc.org.

Thank you!



52nd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders ·

November 18 - 20, 2015

Amelia Island, Florida · Omni Amelia Island Plantation

What's so special about the [52nd Annual NAEPC Advanced Estate Planning Strategies Conference](#), anyway?

- ⌘ The program provides direct access to 13 nationally-known presenters providing education perfect for every member of your council.
- ⌘ It's NAEPCs only face-to-face meeting each year.
- ⌘ Attendees will receive nationwide, multi-disciplinary continuing education credit.
- ⌘ The registration fee is low with most meals included.
- ⌘ Participants will experience the charm of Amelia Island, Florida and the newly-renovated Omni Amelia Island Plantation.

How can our council participate?

- ⌘ Send a member of your executive committee or board and council staff to [Council Leadership Day](#). (Paid administrators attend the program with no registration fee!)
- ⌘ Set a board goal to have at least 10 regular members of your council attend the Technical Education portion of the program – plan a special “meet and greet” while together in Florida!
- ⌘ Include the “early bird” brochure in your council dues mailings and email messages.
- ⌘ Distribute copies of the conference brochure at remaining meetings or as the council season gets started in the fall.
- ⌘ Explain the relationship between NAEPC and your EPC at council gatherings.

This is your conference – a program built by and for estate planners! Plan on attending in 2015!

Copies of the early brochure are available by contacting the NAEPC office at (866) 226-2224 or eleanor@naepc.org.

Best Practice Tidbit ·

We want to hear from you! Please email eleanor@naepc.org with suggestions for new referral lists or documents.

Looking for best practices and tidbits? Visit the “Referral Lists” page of the website built just for you council leaders! Looking for guidance on a particular issue? Please contact our national office – we stand ready to assist.

Member Benefits, Programs & Services 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 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.

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.

Existing Benefits

- [Acquire Seminar Marketing](#)
- [American Bar Association Paralegal Program](#)
- [Amicus Creative Media](#)
- [Bloomberg BNA's Art of the Estate Tax Return by Keith Schiller](#)
- [BVR's Guide to Business Valuation Issues in Estate & Gift Tax edited by Linda Trugman, CPA/ABV, CBA, ASA, MBA](#)
- [Charitable Planning Desk Reference for Advisors offered by Strategic Philanthropy](#)
- [Cloudia Assistant](#)
- [CrummeyService, America's Leading ILIT Software Company](#)
- [Disinherit the IRS](#)
- [DocuBank: Emergency Access to Vital Documents](#)
- [Estate Assist](#)
- [Estate Planning Smarts, A Practical, User-Friendly, Action-Oriented Guide, By Deborah L. Jacobs](#)
- [EstatePlanningBinders.com](#)
- [Family Business Magazine](#)
- [Family Wealth Map](#)
- [Florida Domicile Handbook: Vital Information for New Florida Residents](#)
- [Heart2Hearts: Workbook and Deck of Cards, Discuss Directives, LLC](#)
- [International Genealogical Search Inc.](#)
- [International Association of StoryKeepers \(I-ASK\)](#)
- [Klark Proposal Software](#)
- [Konica Minolta Business Solutions](#)
- [Lawgic, LLC](#)
- [LegacyQuest, LLC](#)
- [Legal Binder Now \(LBN\)](#)
- [LegalVault - Revolutionizing Attorney Document Storage](#)
- [My Perfect Will](#)
- [My Personal DataSafe LLC, the Nation's Most Comprehensive System for Sharing and Managing Client Information](#)
- [NAEPC Journal of Estate & Tax Planning](#)
- [NationalUnderwriter.com](#)
- [Oswald Companies Personal Excess Liability](#)
- [Ruby Receptionists](#)
- [The ABA Checklist for Family Heirs: A Guide to Family History, Financial Plans and Final Wishes](#)
- [Sterling Cut Glass](#)
- [The Ultimate Estate Planner, Inc.](#)
- [Trusts & Estates Magazine](#)
- [Veracity - MTG \(payment processing solutions\)](#)
- [Washington Institute for Graduate Studies](#)
- [WealthManagement.com](#)
- [Wolters Kluwer Law & Business](#)

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.

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 weekly information 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.)

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The Association of Choice for Estate Planning Professionals