

June 2016 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 its next meeting or forward it via email if a meeting is not scheduled soon.

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Message from Council Relations Committee Chair Kit MacNee, CFP®, CRPC®, AEP®, CSPG



The Council Relations Committee wishes to thank the dedicated work of those councils that submitted applications for the 2016 Walter Lee Davis, Jr. & Leonard H. Neiman Council of Excellence Award. The sub-committee will soon be reviewing applications. We are looking forward to recognizing both Council of Excellence and 5 Star award recipients during [Council Leadership Day](#) at the [53rd Annual NAEPC Advanced Estate Planning Strategies Conference](#) this November at the Wigwam (located just outside of Phoenix, AZ).

If you feel a nudge to volunteer your time to help the Council Relations Committee, we welcome your call. Please contact the national office or Kit Mac Nee, mary.mac.nee@morganstanley.com, if you want to learn more about volunteering for NAEPC.

Your council leadership will be hearing from one of the Council Relations Committee members about all the benefits available to individual members soon. In the interim, please review <http://www.naepc.org/membership> to see all of the valuable benefits available to your council and its members. Should your council desire a 30-minute benefit review call, please contact our national office.

Finally, I thank the entire [Council Relations Committee](#) for their time keeping in touch with each of the 260+ NAEPC-affiliated councils.

July 13, 2016 Webinar, Please Share With Your Members

Wednesday, July 13, 2016 3:00pm - 4:00pm ET

Secondary Planning for Charitable Remainder Trusts (CRTs)

Evan D. Unzelman, President, Sterling Foundation Management

Attendees will learn about the options available to clients with CRTs—gift the income interest to charity, terminate/commute the CRT, sell the income interest, do a CRT Rollover—and how to review a client's CRT to determine which option, if any, is the best fit for the client.

With over a decade of specialized experience in the field of private foundations and CRTs, Evan Unzelman has risen quickly through the ranks of charitable and tax planning. He began his career at a multifamily office, where he helped provide comprehensive solutions to the complex challenges faced by affluent families. In 2006, he joined Sterling, where he oversaw the administration of all of the firm's charitable clients. In 2008, he was hand-picked to lead the expansion of the firm's CRT brokerage platform. Evan was elevated to COO in 2010 to expand and sharpen Sterling's service offering for charitable donors and their advisors. During that time, he launched Sterling's donor advised fund, grew the firm's CRT income interest sale volume year-over-year, and helped create and implement the "CRT Rollover" strategy to provide new options to CRT donors beyond selling their income interest. In 2015, Sterling's Chairman and CEO promoted Evan to President, expanding his responsibilities to include the supervision of all business lines. Evan is a recognized expert and sought after speaker in the field of charitable planning, and CRTs in particular. He speaks widely to a variety of audiences including attorneys, accountants and financial advisors, primarily on the sale of income interests in CRTs (Standard CRUTs, NIMCRUTs, NICRUTs and CRATs), tax implications of CRTs, and the role CRTs play in the estate and wealth planning of affluent clients. Evan received finance and economics degrees (summa cum laude) from Pacific Lutheran University in Tacoma, Washington.

[REGISTER HERE](#) for this complimentary webinar.

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.**

The Robert G. Alexander Webinar Series was launched in September 2013 to provide estate planners with accessible, high quality, multi-disciplinary education. Programs are available live and on-demand to individuals and to be used as group gatherings where EPC members view the program together in a single location. New in 2016, we are excited to announce yearly subscription rates that provide access to all programs during the calendar year. For the full schedule of national presenters, information about both individual and subscription rates, and an archive of prior programs, please click [HERE](#). Why not consider adding a webinar to your schedule as a new and creative program?



Website Services Through NAEPC

NAEPC offers a variety of continually-enhanced website platforms for your affiliated local council with varying capabilities. A detailed list of the offerings can be found [online](#), take a look today!

This is a great time of year to consider starting or upgrading your service and to have that discussion with your board of directors. In addition to a 50% new or upgraded service discount on 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!

Currently using our service and looking for a refresher? Contact the NAEPC office for a tutorial today!



53rd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION

November 16-18, 2016

Phoenix / Scottsdale, Arizona

The Annual Advanced Estate Planning Strategies Conference is planned each year to:

- Educate both councils and their members in a single event
- Provide an enriching attendee experience
- Offer ample networking time intertwined with exceptional multi-disciplinary educational content
- Allow attendees to experience the uniqueness of The Wigwam, the host resort

We hope you are as excited about participating and sharing information about the program with your membership as we are about planning our 53rd annual event! For more information, including a full speaker roster, details about the exciting 2-day companion program, and online registration, please visit www.NAEPc.org/conference.

You've already made NAEPC your association of choice; why not make the 53rd Annual NAEPC Advanced Estate Planning Strategies Conference your national conference of choice?

Member Benefits 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 services 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. Click on the links below to browse the list by category, or see the [full list of opportunities](#).

- 🔑 [Marketing and Website Design Services](#)
- 🔑 [Educational Opportunities](#)
- 🔑 [Subscriptions and Publications](#)
- 🔑 [Programs and Services for Council Development](#)
- 🔑 [Software](#)
- 🔑 [Presentation Materials and Office Supplies](#)
- 🔑 [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.

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 regular posts 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.)

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](#).

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 eleonor@naepc.org. **Thank you!**

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The Association of Choice for Estate Planning Professionals