

June 2017 Issue

National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter 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 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.

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NAEPC Board Nominations

The National Association of Estate Planners & Councils is the association of choice for estate planning professionals! Our membership is comprised of affiliated local estate planning councils and Accredited Estate Planner® designees from throughout the country. As a result, the board of directors greatly reflects the individual estate planning councils and their members. 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. Please take a moment to contact these persons and ask if they have an interest in serving their profession as a possible future NAEPC board member. Interested parties should submit a NAEPC board nomination form by Friday, June 30, 2017. Feel free to nominate more than one candidate, and please consider submitting yourself as a candidate if you wish. Please reference our email of May 30th or contact the national office for more information or the application. Nominations will be accepted through Friday, June 30th.

Estate Planning Law Specialist (EPLS) Certification – Live Review Course & Exam

We are also excited to share this information with you for our "sister" organization, the Estate Law Specialist Board. In partnership with the Notre Dame Tax & Estate Planning Institute, the Estate Law Specialist Board offers attorneys a unique opportunity to participate in a live review course and proctored exam to earn the

[Estate Planning Law Specialist \(EPLS\) certification](#), the only national board certification in estate planning. The event will take place on Wednesday, October 25, 2017 on campus at the Notre Dame Law School from 8:00 am to 12:00 pm and will be followed by the two-hour proctored exam that begins at 2:00 pm. Attorneys who are interested in learning more about the EPLS certification, the live review course and exam, and the remainder of the program requirements should contact the national office at 866-226-2224 or admin@naepc.org. All registrants for the review course and the exam will receive a 10% discount on tuition to attend the 43rd Annual Notre Dame Tax & Estate Planning Institute! To download the preliminary schedule for the Notre Dame Tax & Estate Planning Institute, please click [HERE](#).

June 14, 2017 Webinar

3:00pm - 4:00pm ET (on-demand access is also available)

Wednesday, July 12, 2017 3:00pm - 4:00pm ET

Meet the Rileys: Can this Case be Closed? with Philip Cubeta, CLU®, ChFC®, MSFS, CAP®

Join with us for this intermediate to advanced program to plan for J.D. and Mary Riley, age 70, as they plan to exit their \$18 million S-Corporation and transition to greater giving and community engagement. What holds them back as they contemplate signing off on their plans? Where might our process have gone wrong? Can the case be saved? [REGISTER HERE](#) for the individual program. To register for the 2017 series, please click [HERE](#).

Phil teaches philanthropy to advisors and nonprofit gift planners in the American College Chartered Advisor in Philanthropy (CAP) program. Prior to this he was Chief of Staff for The Nautilus Group, an initiative of New York Life, providing estate and business planning strategies to the clients of the companies leading representatives. His original training was in the humanities.

Individual Webinar Registration Fees

\$40 Accredited Estate Planner® designee

\$60 Member of an affiliated local estate planning council or at-large member of NAEPC

\$100 Non-member

\$250 Council meeting or group gathering (additional feeds are available for \$25)

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.**

Webinars as Creative Programming

*Tired of the same old meeting
format?*

*Considering new programming
ideas?*

*Trying to engage younger
members?*

As you create your programming schedule for the upcoming season, why not consider adding a webinar or two? At the recent [Regional Leadership Day](#) events, programming was consistently noted as a key component to member satisfaction, growth, and retention. Distance-learning programs are a great way to bring your EPC high-caliber speakers with little or no cost. [The Robert G. Alexander Webinar Series](#) is available to councils for live or on-demand* group showings. Councils have reported offering the webinars as a regular part of their schedule, for special “meet up” brown bag events, and even as a free member benefit or special program for AEP® designees. Contact the NAEPC office today to learn more about your options

and how group webinars can enhance your EPC! **Remember, all councils can receive one complimentary webinar each calendar year!**

**Programs can be shown at a date and time chosen by the council as long as it is at least 48 hours after the live broadcast.*



54th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION

November 15-17, 2017 · New Orleans, LA

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 Roosevelt New Orleans, our host hotel

We hope you are as excited about participating and sharing information about the program with your membership as we are about planning our 54th 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 2016 event, please visit our [website](#). Don't miss this unique opportunity to visit with - and learn from - other volunteer leaders from across the country!

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 every council meeting, whether verbally or in print in dues and regular mailings. 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.

Newest Benefit, Just for your Estate Planning Council

AdvisorAdit - Mobile Event Services

DIGITAL CONFERENCE BOOK - COURSE SURVEYS - ATTENDANCE TRACKING

Introducing New NAEPC Program: 50% off standard rates and a free trial! [Click for a Quick Tour!](#)

The AdvisorAdit suite of mobile event services is a cost-effective way to modernize your attendee experience. With AdvisorAdit's suite of digital event services EPCs enjoy:

- An intuitive attendee experience...available on any leading mobile device
- Simple event set up and real time host monitoring, updating and reporting
- Flexibility to use only the services that are right for your event
- Special NAEPC pricing scaled to support small meetings to large expos

To learn more, please visit the NAEPC [website](#) or contact info@advisoradit.com to take advantage of a free trial that includes Digital Conference Book, Survey, Attendance/CE tracking, Certificates and reporting services for EPC content. Good for one event up to 50 attendees and up to 3 designations.

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Click on the links below to browse the list of all 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 eleanor@naepc.org. **Thank you!**

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The Association of Choice for Estate Planning Professionals