

June 2020 Special Issue

National Association of Estate Planners & Councils

Monthly Minute

· the monthly administrative newsletter for affiliated local council officers ·

This email is being sent to you as an officer or staff executive for your NAEPC-affiliated local estate planning council, all officers on file with NAEPC receive the email.

Please share this publication with your entire board at its next meeting or forward it via email if a meeting is not scheduled soon.

- Message from the Council Relations Committee Chair, Kit Mac Nee
- Your Council and COVID-19, Update #4
- New COVID-19 Resource Library
- Cancellation Notice: 57th Annual NAEPC Advanced Estate Planning Strategies Conference
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Message from Kit Mac Nee, NAEPC Council Relations Committee Chairperson

The last few months have been a whirlwind of changes that have impacted all aspects of our lives and organizations, and uncertainty still looms. That said, I have witnessed firsthand the desire of our councils to continue to serve their members and communities well with flexibility and ingenuity; it has been an honor to serve as the chairperson of the Council Relations Committee during this time.

Although times have changed, our commitment to service and many of the association's activities remains the same. I am grateful to the nearly 40 estate planning councils that applied for the Council of Excellence Award this year; the committee is hard at work reviewing the applications as this email is being sent.

The website and technology committee recently [added a tutorial](#) to their archives that addresses sponsorship best practices and the use of the website system to increase the value of sponsorships. If you haven't participated in a tutorial, please remember that they are all available on-demand.

We hosted five Townhall Roundtable sessions in May that reached over 120 council leaders and staff members and over 80 estate planning councils. The participants shared their council's successes and struggles openly for the greater good – and that commitment to service is what we are all about. Five more Town Hall Roundtable Sessions are scheduled in July – read on to learn more and find the registration links.

As the days and months continue, please let NAEPC know how we can help your council thrive. We're glad to have your EPC as a member!

Your Council and COVID-19, Update #4

Your council is not alone as it works to tackle planning and operations in light of COVID-19; as one item is addressed, another question come up!

NAEPC has planned additional "Townhall Roundtable" sessions for council leaders and staff executives during June and July. These hour-long informal virtual events will be a continuation of the programs that began in

May, giving councils a forum to share COVID-19 related successes while also addressing the most common questions with regard to member engagement, dues structure, etc. Click on each link below to register.

THIS WEEK! [Thursday, June 11th at 1:00 pm ET](#)

[Wednesday, June 24th at 3:30 pm ET](#)

Staff Executives / Administrators Only: [Thursday, July 9th at 12:00 noon ET](#)

[Monday, July 13th at 2:00 pm ET](#)

[Wednesday, July 29th at 2:30 pm ET](#)

A committee is also continuing its work to address changing the [Regional Leadership Day](#) programs typically held in June from an in-person event to a virtual event. We will share more on this change as details are available.

Please contact our national office at 866-226-2224 or eleonor@naepc.org at any time; we are happy to discuss operations issues and are always available to join on a board call to discuss these challenges or the benefits of affiliation. You may also read the NAEPC response to COVID-19 [on our website](#).

COVID-19 Resource Library

NAEPC has published a COVID-19 Resource Library under the leadership of president-elect [William D. Kirchick](#).

Full of resources that address issues important to the estate planning profession in light of the health crisis, the library also includes a packet of information that can be used by councils and members to encourage the adoption of emergency measures in their state relating to remote notarization.

The library also includes the notes from the first five Townhall Roundtable Sessions. [Take a look today!](#)

Cancellation Notice:

57th Annual NAEPC Advanced Estate Planning Strategies Conference

Over the last two months, the board has been focusing much of its energy addressing the likelihood of hosting a safe and successful 57th Annual NAEPC Advanced Estate Planning Strategies Conference, which was scheduled from November 3-6, 2020 in Ft. Lauderdale, Florida. We have considered many factors, especially the ability to provide a safe and healthy environment, regularly-changing guidance from various state and national governing bodies, and, of course, the ongoing economic impact to our members, presenters and sponsors.

The Board of Directors has made the formal decision to cancel the annual conference. We appreciate your allowing us the time to approach this decision thoughtfully and with the utmost of care. While disappointed, the board truly believes the cancellation is in the best interest of all involved parties. In the days and months ahead, we will be working to determine how best to handle the various components of the annual conference, including technical education and the possibility of hosting a compelling virtual conference, Council Leadership Day, the Estate Planning Hall of Fame® and Hartman Axley Lifetime Service Award ceremonies. You are welcome to read the full cancellation message [on our website](#). We will share more details as they become available.

New Member Benefit



[Rocket Matter](#) helps estate planning law firms offer better client service and also increase revenues by more than 20%. Founded in 2007 as the first cloud-based legal practice management solution, it has the most powerful, easy-to-use

time and billing software in the industry. With award-winning customer service based in the U.S., it's no wonder thousands of law firms swear by Rocket Matter.

Powerful features include:

- Time and billing
- Contacts, calendaring, and task management
- Online payment processing
- Unlimited document storage, automation, and the most robust NetDocuments integration in the industry
- Project Management
- iPhone and Android apps
- And much, much more!

As an Accredited Estate Planner® designee, Estate Planning Law Specialist certificant, At-Large member, or member of an affiliated local council, you'll receive a **15% lifetime discount** off our Rocket Matter Pro Edition. Learn more by signing up for a free 7-day trial. No credit card required! You'll also receive a free customized demonstration of our software catered to your firm's individual needs. Learn more about your Rocket Matter member benefit [here](#).

You can also contact a member of Rocket Matter's award-winning team at 866-710-1845. Mention that you are a member of NAEPC to receive this great member benefit!

Upcoming Webinars

The Robert G. Alexander Webinar Series provides councils and their members with accessible and affordable multi-disciplinary education. **Programs are available live and on-demand** and one can choose to register for individual programs or for a series subscription. Councils can also register for a group gathering, which provides one feed to be shown to a group gathered together in a single location.

Looking to replace your council's late-season programming? Contact NAEPC and let us help!

Wednesday, June 10, 2020 - 3:00pm - 4:00pm ET

Planning Team Revenue Opportunities Generated by New Tax Law with Terri L. Getman, JD, CLU®, ChFC®, RICP®, AEP® (Distinguished)

Attend this intermediate program to learn more about how an insurance professional has used the recent tax legislation to help clients plan by including several members of the planning team. The presentation will include multiple case examples.

Terri Getman is a nationally-recognized lecturer, author and advisor to financial representatives who provide advice to families and privately-held business owners across the U.S. For more than 30 years Terri has specialized in the appropriate use of life insurance in client's estate, business and executive benefit plans. Terri currently works for Diversified Brokerage Services, one of the largest life insurance brokerage general agencies, but for most of her career she held positions in advanced marketing at several large insurance carriers. [LEARN MORE & REGISTER HERE](#)

> [See all upcoming and previous webinars](#)

Registration Fees	Individual	Series
Accredited Estate Planner® Designee	\$40	\$280
Junior / Student (Junior or Student member of an affiliated EPC or one	\$40	\$280

who is in the process of attaining the AEP® designation by virtue of being enrolled in a required or elective course at The American College)		
Member of Affiliated Estate Planning Council / At-Large Member of NAEPC	\$60	\$420
Non-Member	\$100	\$700
Group Gathering (one feed shown in a single location to a group, additional feeds available for \$25 per location)	\$250	\$1,125

Continuing education credit is available at most NAEPC-hosted webinars for Accredited Estate Planner® designees. In addition, a general certificate of completion will be available for those professionals who feel the program satisfies their continuing education requirements and are able to self-file.

NAEPC Minute is an administrative report that does not take the place of *NAEPC News*, the official newsletter of the NAEPC, 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 reply to this email message if you wish to unsubscribe.

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