July / August 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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Speaker Resources

NAEPC offers two resources for affiliated local councils – the yearly “no charge” speaker program and the online speaker library.

No-Charge Program

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 2015-16 here: 2015-16 Fiscal Year Informational Packet. The kit offers a biography and topic choice(s) for each presenter, as well as their availability. After submitting your request via fax to (216) 696-2582 or eleanor@naepc.org, a representative will 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.

Online Speaker Library

The NAEPC Online Speaker Library offers a variety of presenters who have expressed an interest in speaking to your affiliated local council. Each speaker listing includes contact information, a list of topics, total presentations per year, requirements, years of experience, and a list of the speaker's expertise. Please contact the speaker directly to obtain information regarding availability or fees. The directory is searchable and will allow you to focus on name, topic, home state, zip code, or any combination of the above. To view the library, click HERE.

Newsletter Content Available

Is your council looking for NAEPC-related content for your newsletter? If so, contact us! We are happy to provide brief text appropriate for inclusion in an "NAEPC Corner" of your publication.

New Member Benefits Announced

We are pleased to offer the members of your estate planning council access to three new benefits; full information for each can be found within the section below titled "Member Benefits, Programs & Services Recap."

Ahrens Technologies, LLC
Legal Directives, LLC
The LastingMatters Organizer

August 12, 2015 Webinar, Please Share with Your Members

Wednesday, August 12, 2015 3:00pm - 4:00pm ET
Financed Life Insurance with Exit Strategies
Michael W. Halloran, CFP®, CLU®, ChFC®, AEP® (Distinguished) Nominee

This advanced webinar will provide attendees with an overview of choices available to fund essential life insurance. In addition, the speaker will address options for paying off a loan, should borrowing be required.

< REGISTER HERE **>**

Michael W. Halloran is a wealth management advisor with Northwestern Mutual Investment Services LLC and is an Estate Strategies Group Advisor and a member of Northwestern Mutual' s Estate Business Planning specialist study group; he has been in the financial services industry for over 40 years. Mike carries securities registrations 1, 8, 63, and 65 and, along with his team, has a vibrant practice managing over $160 million of client assets. A graduate of Florida State University and The American College, his approach to financial planning involves analyzing, planning, and implementing customized strategies and while he remains committed to providing comprehensive, integrated financial plans that reflect the clients' values and support their lifelong goals, his true passion lies within estate and business planning for individuals and businesses. Mike has received several industry awards and has been featured in national publications including National Underwriter, Capital Executive, New York University Review, Money, Life Association News, Life Insurance Selling, USA TODAY, New York Times, Chicago Tribune, Congressional Quarterly, and Dow Jones News, and speaks regularly throughout the United States on a variety of topics. He will be inducted into the NAEPC Estate Planning Hall of Fame® in November 2015 and will be honored with the Accredited Estate Planner® (Distinguished) designation at that time. Mike taught at the University of North Florida for 14 years. He is a past president of NAEPC, the Estate Planning Council of Northeast Florida, and the Jacksonville Association of Insurance and Financial Advisors, has served as a national director of the Society of Financial Service Professionals, and is a past member of the board of directors of the Florida Association of Insurance and Financial Advisors. He currently serves Physicians Nationwide as its executive director and is involved on various other community organizations. In his spare time, Mike enjoys running, public speaking, and going to Disney theme parks with his wife Sue.

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.

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

The name has changed, but the Annual Conference remains the same… the go-to event for estate planners!

November 18 - 20, 2015
Amelia Island, Florida · Omni Amelia Island Plantation

Attendees will learn from the best speakers in the estate planning community!

- Steve R. Akers, JD, AEP® (Distinguished): "Annual Update"
- Janelle Benefield: "Financial Reform & Its Impact on Your Merchant Account"
- Tom Breedlove: "The Case(s) for Household Employment Compliance: Case Studies Illustrating How to Mitigate Tax & Legal Risk"
- Mickey R. Davis, JD: "All About that Basis: Creative Ways to Obtain Basis at Death"
- Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished): "Dealing with Uncle Sam, Everyone's Least Favorite Relative in the Family Business (Income Tax Planning for Closely-held Businesses)"
- Michael W. Halloran, CFP®, CLU®, ChFC®, AEP® (Distinguished) Nominee: "Due Diligence in Selecting and Understanding Life Insurance Policies"
- Stephan R. Leimberg, JD, AEP® (Distinguished): "Life Insurance - Key Cases and Rulings of 2014-15"
- Richard A. Oshins, JD, LL.M., MBA, AEP® (Distinguished): "Improving (and/or Revisiting) Popular Estate Planning Strategies"
- Jeffrey N. Pennell, JD: Third Party Trusts in Divorce - Is a Beneficiary's Interest Marital Property?"

- John W. Porter, B.B.A., JD, AEP® (Distinguished): "The 30,000 Foot View from the Trenches: A Potpourri of Transfer Tax Issues on the IRS's Radar Screen"
- Nancy B. Rapoport, JD: "Nudging More Ethical Behavior through Incentives and Checklists"
- Martin M. Shenkman, CPA, PFS, MBA, JD, AEP® (Distinguished): "Planning Potpourri"
- Diana S.C. Zeydel, JD, LL.M.: "Portability or No: Death of the Credit Shelter Trust"

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 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!

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

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.

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.

New Benefits

Ahrens Technologies, LLC

Ahrens Technologies is a market leader in developing websites for estate planners. Clients include hundreds of law firms serving the estate planning needs of seniors and families, large estate planning membership organizations, and non-profit organizations serving our communities. The common thread of all of our clients is their commitment to serving and enriching the lives of their community.

Our unique website development process ensures that our clients are always communicated with and their goals for the website are exceeded. Common features of our websites include:

Integrated Blog Page
Custom E-Newsletter Delivery
Event and Seminar Management

Secure Client Document Storage

For a complimentary website review and to learn about discounts for NAEPC members, Call 434-485-7856 or visit www.ahrenstech.com and complete the contact form for more information.

Legal Directives, LLC
Legal Directives, LLC partners with hundreds of estate planning attorneys and financial planners across the country to provide 24/7 access to clients' healthcare directives and emergency contacts. Their partner program is built to help client-focused estate planning, elder law, and financial planning practices thrive. Service is provided by electronically storing a copy of the client's healthcare directives and then making them available 24/7 by delivering a customized wallet card to the client with instructions for accessing the directives. In addition, we deliver a copy of the healthcare directives to your client's primary care physician.

Features of the Legal Directives Partner Program

- Customized wallet cards - your colors, your logo
- Delivery of wallet cards to your clients within two weeks of enrollment
- Branded fax delivery of healthcare directives to client's primary care physician
- Discounted enrollment rates for NAEPC members
- Support team dedicated to the unique needs of estate planners
- Complimentary client brochures
- Special partner pricing
- Customizable renewal dates for client memberships
- Complimentary memberships for partner and partner staff

If you'd like to learn more about how Legal Directives can contribute to your success visit www.legaldirectives.com/partner_program.php and complete the Partner Program Contact Form. You may also contact us Monday - Friday, 8:30am- 5:00pm ET at 866-363-4894 to learn about our NAEPC partner benefits.

The LastingMatters Organizer: A tool to deepen relationships with your clients & their next of kin.

- Who did mom want to deliver her eulogy?
- Where is the safety deposit box? Key?
- Who is her trustee?
- How is the house titled? The stock accounts?
- What about passwords for Facebook and her computer accounts?

As estate planners, you know all too well that these are just a few of many questions that quickly arise after someone dies or is incapacitated. Most troubling, the answers and wishes, unless clearly articulated ahead of time, can undermine even the most well thought out estate plan. Now, with The LastingMatters Organizer, estate planning professionals have a tool to help their clients collect and outline critical information and these very important “wishes.”

With the Organizer, your clients will have at their fingertips a comprehensive easy-to-use resource that will inform and guide their families and heirs during a time of transition. The graphics, the direct questions, and its thoroughness make The LastingMatters Organizer an effective tool to supplement an estate plan – from the basic to complex – and help collect and clearly articulate a client's wishes on all aspects of their financial, personal, and online lives.

By incorporating The LastingMatters Organizer into the estate plan process, you can help your clients take one large step forward toward ensuring an orderly transition of their assets, their family knowledge and history, as well as their treasured personal belongings. Doing so will ultimately help family members, heirs and caregivers avoid the chaos and confusion that erupts all too often during these emotionally charged times.

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.

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!**

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