July 2014

National Association of Estate Planners & Councils Minute

…the monthly administrative report for affiliated local council leaders

(This email is being sent to you as an **officer on record** or **administrator** for your NAEPC-affiliated local estate planning council, all officers on file receive the email. You are encouraged to share part or all of this publication with your entire membership. *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 online at http://www.naepc.org/events/news.)

Please share this publication with your entire board at the next council board meeting.

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August 13, 2014 Webinar ·

3:00 pm - 4:00 pm ET

2014 Planning With 99 Year GRATs, 33 Year CLATs, and UPSPATS that are Ready To Go!
Turney P. Berry, JD, AEP®* · Wyatt, Tarrant & Combs LLP

About the program:
This webinar will discuss three interesting planning ideas popular in 2014: the long-term GRAT that hopes to achieve estate reduction as interest rates rise, the long-term CLAT that hopes to achieve estate reduction because current interest rates are artificially low, and the "ready to go" UPSPAT that hopes to turn an ancestor's unused estate tax exclusion into an asset.

About the speaker:
Turney Berry is an estate planning attorney in Louisville, Kentucky who chairs the 26 attorney estate planning group of Wyatt, Tarrant & Combs, LLP. Turney writes and speaks frequently on estate planning matters across the country. He is a former regent of ACTEC, a Uniform Law Commissioner, a member of the advisory committee of the Heckerling Institute on Estate Planning, and a trustee of the Southern Federal Tax Institute.
This is an intermediate – advanced program (advanced topics, simply explained!)

REGISTER HERE

**Kentucky does not certify estate planning specialties.*

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.

Registration Fee
• $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)

Upcoming & Past Programs
The full list of upcoming and past programs can be found at http://www.naepc.org/events/webinar. Past programs are available for purchase at the live registration rate.

New Issue of NAEPC Journal of Estate & Tax Planning Released ·
We are pleased to announce the most recent quarterly release of the NAEPC Journal of Estate & Tax Planning. The issue can be found online at www.NAEPCJournal.org where you will also find an archive of past issues.

This issue we are proud to feature an article provided by *Trusts & Estates* and authored by John T. Midgett, JD, AEP®, "The Modern Practice." This article speaks directly to our core value, the team approach to estate planning.

Please share information about this fantastic resource with your entire membership! We are excited to introduce a new star rating system within this issue – readers now have an opportunity to rate the articles!

The Journal is compiled by practitioners for practitioners within the various disciplines of estate planning. Your contributions are welcome, please submit them to editor@naepcjournal.org.

2014-2015 No-Charge Speaker Program Available ·
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 2014-15 fiscal year below.

2014-15 Fiscal Year Informational Packet

The kit offers a biography and topic choice(s) for each presenter, as well as their availability. All presentations will be assigned on a first come, first served basis so ACT FAST! Don't miss the chance for your council to take advantage of this exciting program! After submitting your request via fax to (216) 696-2582 or eleanor@naepc.org, a representative will phone or 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.

What Happens at Council Leadership Day Anyway? ·
Each year, in conjunction with the annual conference, the NAEPC provides one full day of education and leadership sessions just for the board / officers of our affiliated local councils; this event is called Council Leadership Day. NAEPC recommends that at least one officer at the vice-president level or below attend along with the council's staff member. The morning is dedicated to the annual meetings and informative updates from both NAEPC and The NAEPC Education Foundation, while afternoon sessions are committed to leadership development. The attendee can expect to interact with fellow volunteer leaders, attend breakout sessions designed for idea sharing & growth and learn about ongoing NAEPC programs and services available to the council and their membership. The majority of this day is dedicated to open roundtable discussions with leaders of councils of like size facilitated

by volunteers who are also board members from their home council. Click HERE to see the talking points from 2013, session notes by size, and PowerPoint presentation from the annual meetings.

51st Annual Conference ·

November 5 – 7, 2014
San Antonio, Texas

Have you seen the fantastic line-up of speakers for the technical education portion of the 51st Annual Conference?

Thursday, November 6, 2014

- Robert S. Keebler, CPA, MST, AEP® (Distinguished) · 15 Best Planning Ideas for 2014 and Beyond
- Todd A. Fithian · The True Frontier of Estate Planning: Effective Collaboration
- Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP® (Distinguished) Nominee · Planning for an Aging Population: Your Clients, Your Parents, and Someday You!
  Repeated Breakout Sessions
  - Susan T. Bart, JD · Decanting: Refining a Vintage Trust
  - Elizabeth L. Morgan, JD · Life Insurance, Annuities, and Captive Insurance as Tools for Domestic and International Estate & Tax Planning
  - Thomas Rogerson · Family Communication, Values, Mission, Philanthropy - How Do You Help a Client Get Started?
- Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished) · Hot Income Tax Tips for Estate Planners
- Private Session for Active Accredited Estate Planner® Designees

Friday, November 7, 2014

- Jeffrey N. Pennell, JD · Annual Update
- Lee J. Slavutin, MD, CLU®, AEP® (Distinguished) Nominee · Tax Traps Involving Life Insurance
- Jerome M. Hesch, JD, AEP® (Distinguished) · Reality of Sale: Dealing with the 10% Myth for Seeding Installment Note Sales to IDGTs and BDITs
- Jonathan G. Blattmachr, Esq., AEP® (Distinguished) · Supercharged Shelter Credit Trust vs. Portability: It's Not that Complicated to Choose the Best
- S. Stacy Eastland, JD, AEP® (Distinguished) · Some of the Best Charitable Planning and Estate Planning Ideas We See Out There in the New 2014 Tax Environment©
- Stanley M. Johanson, JD, LL.M., AEP® (Distinguished) · Recent Developments Affecting the Estate Planning Practice

To learn more about the 51st Annual Conference, please visit http://www.naepc.org/conference. Please consider sharing this information with your entire membership as well!

The early bird discount expires September 30th! Don't delay!

Best Practice Tidbit ·

Is your council struggling with how best to recognize those members who hold the Accredited Estate Planner® designation? Look no further than our helpful resource document, found on our website.

Looking for additional best practices and tidbits? Visit the "[Referral Lists]" page of the website built just for you – council leaders!

Member Benefits, Programs & Services Recap ·

Members of the National Association of Estate Planners & Councils and members of your affiliated local council have access to a wide array of benefits, programs & services 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.

Existing Benefits

Acquire Direct Marketing
Advisys
American Bar Association RPTE Paralegal eLearning Program
American Dream Planner LLC
Amicus Creative Media
BizActions LLC
Business Valuation Resources, LLC
Cards for a Cure
CBData™
Charitable Planning Desk Reference for Advisors offered by Strategic Philanthropy
Cloudia Assistant
CrummeyService
DocuBank
Estate Planning Smarts / Pensworth
EstatePlanningBinders.com
Family Business Magazine
Fiserv Investment Services
Florida Domicile Handbook
Heart2Heart Workbook & Deck of Cards, Discuss Directives, LLC
International Association of StoryKeepers (I-ASK)
International Genealogical Search Inc.
Klark Proposal Software
Konica Minolta Business Solutions
Lawgic, LLC
LegacyQuest, LLC
Legal Binders Now
Legal Vault
My Perfect Will
My Personal DataSafe LLC
NationalUnderwriter.com
Oswald Companies Personal Excess Liability
Private Wealth magazine
Ruby Receptionists
Sterling Cut Glass
The ABA Checklist for Family Heirs… / ABA Book Publishing
The Ultimate Estate Planner
Trusts & Estates
Veracity – MTG (payment processing solutions)

WealthManagement.com
Wolters Kluwer Law & Business

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.

LinkedIn Sub-group for Council Leaders ·

NAEPC has launched a sub-group of the general association group on LinkedIn, just for council leaders. Join today to interact with other council leaders from across the country and to receive weekly posts from NAEPC! The sub-group is available only to officers and directors of affiliated local estate planning councils. See you there ~

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.

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The Association of Choice for Estate Planning Professionals