

July 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.

IN THIS ISSUE

- Planning for a New Fiscal Year
- August 10, 2016 Webinar, Please Share With Your Members

IN EVERY ISSUE

- 53rd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders
- Benefits Available to Members of Your Council
- Stay Connected Via LinkedIn
- Officer Update Form / Collecting Formation Dates



Planning for a New Fiscal Year

Many councils affiliated with NAEPC have recently changed officers and are preparing for a new fiscal year. Here are a few helpful reminders of important activities to begin or consider as a new programming season kicks off. Remember that this list is a starting point, feel free to add or subtract as the council's activities dictate.

- Set and share schedule of board meeting dates and times so that the entire leadership can block the time in their calendar
- Schedule a transition meeting so the incoming and outgoing president can share goals and best practices
- [Send NAEPC a roster of new executive committee members](#)
- Form and activate key council committees like programming and membership
- Update the website after conducting a yearly review of the pages, making sure to refresh the message from the president, officers, etc. (Don't have a website? [Contact NAEPC!](#))
- Decide who will be attending [Council Leadership Day](#) at the [53rd Annual NAEPC Advanced Estate Planning Strategies Conference](#) as your EPCs representative (and set a goal for how many EPC members will attend the Technical Education portion of the event!)
- Create a budget
- Gather materials from NAEPC to ensure that your members are well-versed in the benefits they can take advantage of

- Discuss whether your EPC will participate in key NAEPC programs, like the Accredited Estate Planner® designation [Council Nomination Program](#) & the [LISI service](#)

Best wishes as your EPC begins a new programming year!

August 10, 2016 Webinar, Please Share With Your Members

Wednesday, August 10, 2016 3:00pm - 4:00pm ET

Tax and Estate Planning for Divorce

Carlyn McCaffrey, LL.B., LL.M., AEP® (Distinguished)

This intermediate program will discuss the tax consequences of the cash and other property transfers typically made in connection with divorce. This program will focus on identifying the tax risks to the paying spouse as well as the receiving spouse. It will also explore the transfer tax savings opportunities that a carefully structured marital settlement agreement can provide to the divorcing spouses and their children.

Carlyn S. McCaffrey is a partner in the law firm of McDermott Will & Emery LLP and is co-head of the private client practice in the firm's New York office. She focuses her practice on tax and estate planning. She is a fellow and a past president of the American College of Trust & Estate Counsel, a fellow of the American College of Tax Counsel, a member of the International Academy of Trust & Estate Counsel and a member of the Joint Editorial Board for Uniform Trust and Estate Act of the National Conference of Commissioners on Uniform Laws, a member of the Advisory Committee of the Heckerling Institute on Estate Planning, and a member of the Adjunct faculty of the University of Miami Law School. [REGISTER HERE](#)

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

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?



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 NAEPC Advanced Estate Planning Strategies Conference has become the "go-to" event for estate planners from across the country, providing an exciting line-up of nationally-recognized speakers, a fabulous location and unique headquarters hotel, and incredibly competitive registration and guest room fees. The conference is built by and for all of the disciplines that make up the estate planning team, making it an event that is not to be missed. In addition, the event provides one entire day just for the leaders of your EPC. Please consider sending a representative from your council board of directors to Arizona this November! For more information about the conference, click the link below. To learn about Council Leadership Day, please visit <http://www.naepc.org/conference/leadership-day>.

The early bird registration brochure, online reservation link, and general information can be found at <http://www.naepc.org/conference>. The \$50 early bird discount expires Friday, September 30, 2016—don't delay in making your reservation.

The contact on record for each EPC will soon be receiving a small supply of conference brochures; please pass them out at upcoming meetings and let our national office know if additional copies are needed!

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

National Association of Estate Planners & Councils

1120 Chester Ave., Ste. 470

Cleveland, OH 44114

(866) 226-2224 - fax (216) 696-2582

admin@naepc.org

The Association of Choice for Estate Planning Professionals