

July 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.

### IN THIS SPECIAL ISSUE

- July 2017 Council Update Letter from NAEPC
- Planning for a New Fiscal Year
- 2017/2018 "No Charge" Speaker Program Kit Released
- Special Council Discount Program for 54<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference



### July 2017 Council Update Letter from NAEPC

NAEPC has recently mailed the officer on record for your estate planning council the first of two national updates for 2017. Read your copy [HERE](#).

### 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 presidents can share goals and best practices
- [Send NAEPC a roster of new executive committee members](#)
- Form and activate key 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 [54<sup>th</sup> 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](#) (a \$500 stipend is available to host an AEP® Informational Session during 2017) & the [LISI service](#)

Best wishes as your EPC begins a new programming year!

### 2017/18 “No Charge” Speaker Program

NAEPC offers each affiliated local council one speaker or webinar each year at no charge through the "No-Charge Speaker Program." The participating speakers are either current board members of NAEPC or past presidents and will offer both a technical presentation and a refresher about NAEPC. A full packet of information can be downloaded [HERE](#).

Available Speakers for the 2017/18 Season:

Hartman Axley, CLU®, ChFC®, JD, CFP®, MSFS, RHU, AEP®  
 Joseph V. Falanga, CPA, AEP®, TEP  
 Thomas M. Forrest, TO, AEP® (Distinguished)  
 Michael W. Halloran, CFP®, CLU®, ChFC®, AEP® (Distinguished)  
 Al W. King, III, JD, LL.M., AEP® (Distinguished)  
 Lawrence M. Lehmann, JD, CAP®, AEP®  
 Lawrence J. Macklin, Esq., CPA, AEP®  
 Clark B. McCleary, CLU®, ChFC®, MSFS, AEP® (Distinguished)  
 A. Stephen McDaniel, JD, AEP®, EPLS  
 Jordon N. Rosen, CPA, MST, AEP®  
 Susan P. Rounds, JD, CPA, LL.M. (taxation), AEP®, TEP  
 Paul S. Viren, CLU®, ChFC®, AEP®  
 Shane Westhoelter, AEP®, CLU®, LUTCF

The informational packet 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! After submitting your request, 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 contact details for the speaker. **Don't forget... councils are also permitted to use one webinar in place of an in-person speaker, see page 10 of the packet for details.**

### Special Council Discount Program for 54th Annual NAEPC Advanced Estate Planning Strategies Conference

The [Annual NAEPC Advanced Estate Planning Strategies Conference](#) is the go-to conference for multi-disciplinary education and professional networking. The program provides [pre-conference sessions](#) for volunteer leaders from the 270+ councils around the country followed by two full days of technical sessions and nationwide continuing education credit that are appropriate for every member of your estate planning council!

In the spirit of true collaboration, NAEPC is now offering all affiliated estate planning councils an opportunity to provide their membership with a substantial \$150 discount to attend the already-economical program - which can be combined with other incentives, including the early bird and active Accredited Estate Planner® discounts! In exchange, we ask that your council leadership pledge to promote the event and available discount to your membership regularly between now and November, send at least one leader to the pre-conference sessions, and adopt a board goal of having the lesser of 5% or 15 or more members in attendance. Please email [conference@naepc.org](mailto:conference@naepc.org) to learn more about this program and for a copy of the informational flyer and commitment form.

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*The Association of Choice for Estate Planning Professionals*