

August 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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September 10, 2014 Webinar ·

3:00 pm - 4:00 pm ET

In-home, Private-duty Care is on the Rise: Understanding the Impact of New Legislation and How to Help Clients with Employment Risks & Responsibilities

Tom Breedlove of CARE.com

The repeal of the Companion Care Exemption for third-party caregivers is changing the care landscape and driving more families to employ their own caregiver. Attend to learn how the new law will impact your clients and how to help them easily and effectively manage the payroll, tax, and labor law obligations that come with being a “household employer.” Attendees will walk away with tips and tools to help families avoid risk, save time, and save money.

This sponsored webinar is available at no-charge to members of all affiliated local councils! [REGISTER HERE](#)

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.

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.

Help Us Welcome 6 New Councils ·

NAEPC is nearly 260 councils strong and within those councils there are nearly 29,000 individual members! Please join us in welcoming six newly-affiliated estate planning councils:

Estate & Business Planning Council of Worcester
Estate Planning Council of Lancaster County
Greater Sussex County Estate Planning Council
Howard County Estate Planning Council
South Central Pennsylvania Estate Planning Council
Woodland Hills Tax & Estate Planning Council



51st Annual Conference ·

November 5 – 7, 2014 · San Antonio, Texas

BREAKING NEWS!

- The early bird discount expires on September 12th – don't delay!
- The full program brochure has been released and can be found at <http://www.naepc.org/conference>.

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 12th! Don't delay!

Best Practice Tidbit -

Many councils are considering how best to increase non-dues revenue. If you are “in this boat,” you may wish to consider adding meeting sponsors to your program. Click [HERE](#) for access to a sample sponsor kit. In addition, the NAEPC office is always available for assistance.

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

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

Washington Institute for Graduate Studies
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.

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