

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.

IN THIS ISSUE

- Council of Excellence and 5 Star Council Honorees Announced
- Leimberg LISI Service
- Where Has NAEPC Been in 2015?
- September 9, 2015 Webinar, Please Share with Council Members

IN EVERY ISSUE

- 52nd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders
- Benefits Available Members of Your Council
- Officer Update Form / Collecting Formation Dates
- Stay Connected Via LinkedIn

Council of Excellence and 5 Star Council Honorees Announced

Please join the National Association of Estate Planners & Councils in congratulating those Estate Planning Councils chosen as 2015 [Council of Excellence Award](#) recipients:

- Extra-Small Council: Estate Planning Council of Riverside County
- Small Council: Bergen County Estate Planning Council, Inc.
- Medium Council: Estate Planning Council of Chattanooga
- Large Council: Baltimore Estate Planning Council
- Extra-Large Council: Boston Estate Planning Council

We also celebrate with those Estate Planning Councils honored with “5 Star” status, recognizing achievement in the daily operation of a successful organization:

- Small Council: Greater New Jersey Estate Planning Council
- Medium Councils: Central Arizona Estate Planning Council, Estate Planning Council of Central New York, Estate Planning Council of Eastern New York, Nassau County Estate Planning Council, New Orleans Estate Planning Council
- Extra-Large Councils: Chicago Estate Planning Council, Estate Planning Council of Cleveland

Leimberg LISI Service

Through a very special arrangement with Steve Leimberg, estate planning councils affiliated with NAEPC have an opportunity to provide their members with the Leimberg LISI Service at a greatly reduced fee*.

Members of enrolled councils will have unlimited access to Leimberg Information Services' huge database of cases, rulings, legislation, and much more at www.leimbergservices.com. Leimberg Information Services (LISI) provides financial service professionals fast, frank, and incisive analysis of proposed and recent legislation, regulations, cases, and rulings by industry experts. After enrollment, estate planning council members will receive weekly email reminders from NAEPC that the Leimberg Information Service website is available through membership in your estate planning council and council leadership will receive a monthly tool to pass out at meetings or via email.

For additional information, including cost and an enrollment form, please click [HERE](#).

**This service is available to an estate planning council only. All members of the EPC must be enrolled. Individual subscriptions are not available at this time.*

Where Have We Been?

Each year, NAEPC hits the road to exhibit at various estate planning-related conferences, hoping to encourage membership in local estate planning councils, offering a reminder of the benefits available to existing council members, and to connect with volunteer leaders of affiliated councils. We have had a presence at the following conferences in 2015:

- AICPA Personal Financial Planning Conference, January, Las Vegas
- WealthCounsel Symposium, July, San Diego
- AICPA Advanced Estate Planning Conference, July, Salt Lake City

We also plan on exhibiting this September 17th and 18th at the Notre Dame Tax & Estate Planning Institute in South Bend, Indiana! Stop by if you are attending!

September 9, 2015 Webinar, Please Share with Your Members

Wednesday, September 9, 2015 3:00pm - 4:00pm ET

Financial Reform: Impact on Your Merchant Account sponsored by LawPay®

Janelle Benefield

There is no fee to attend this special sponsored webinar!

Learn the ins and outs of accepting payments while taking an in-depth look behind the rules and regulations of correctly accepting credit cards. In this special presentation, LawPay will cover merchant account basics including EMV changes, PCI Compliance, 6050 IRS regulation and 1099 reporting, as well as the ABA Rules of Professional Conduct relating to the protection of trust accounts.

Janelle Benefield leads the LawPay team of professional Account Managers who consult and advise new clients on the LawPay solution. In addition, she works with the LawPay training team to educate attorneys through classes and CLEs on payment best practices, PCI Compliance, and chargeback prevention.

[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. **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.



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

Please plan on joining us from November 18-20, 2015 in Amelia Island, Florida for our signature annual event, the [52nd Annual NAEPC Advanced Estate Planning Strategies Conference with pre-conference sessions for Estate Planning Council Leaders.](#)

The program offers one day for leaders of estate planning councils (Council Leadership Day, Wednesday, November 18th) and two full days of continuing education for every estate planning discipline (Thursday, November 19th & Friday, November 20th). The Annual Conference is open to all estate planning professionals!

Reasons to Attend:

- Two full days of multi-disciplinary technical education
- Nationally-known presenters
- Up to 15 hours of continuing education credit in two days of sessions
- Networking with estate planners from around the country
- Competitive registration fee with most meals included and a reduced rate for estate planning council members

Hurry! The early bird discount expires September 30th!

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.

Existing Benefits

- [Acquire Seminar Marketing](#)
- [Ahrens Technologies, LLC](#)
- [International Association of StoryKeepers \(I-ASK\)](#)

- [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.](#)
- [Klark Proposal Software](#)
- [Konica Minolta Business Solutions](#)
- [Lawgic, LLC](#)
- [LegacyQuest, LLC](#)
- [Legal Binder Now \(LBN\)](#)
- [Legal Directives, LLC](#)
- [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 LastingMatters Organizer](#)
- [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 eleonor@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