August 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.

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53rd Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders

· EDUCATION & COLLABORATION

November 16-18, 2016
Litchfield Park, Arizona (near Phoenix/Scottsdale)

Won't you consider joining us in Arizona in November for our signature annual event, the 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 16th) and two full days of continuing education for every estate planning discipline (Thursday, November 17th & Friday, November 18th). The Annual Conference is open to all estate planning professionals, especially the members of your EPC!

Reasons for your members 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 EPC members

Reasons for your council to send an officer & council administrator / executive to Council Leadership Day:

- Learn creative ideas for membership growth and retention
- Gain an understanding of the challenges other councils are facing and how to combat them
- Discuss cutting-edge initiatives
- Brainstorm ways to increase non-dues revenue
- Expand your perspective on what similarly sized councils are doing on a daily basis
- Gather information about how NAEPC can assist the council

For full program information, including the newly-released full registration brochure, please visit www.NAEPC.org/conference. To learn more about Council Leadership Day, and to see the highlights from 2015, click HERE.

Hurry! The early bird discount expires September 30th!

September 14, 2016 Webinar, Please Share With Your Members
Wednesday, September 14, 2016 - 3:00pm - 4:00pm ET
Income Tax Deductions for Charitable Bequests of IRD
Christopher R. Hoyt, JD, AEP® (Distinguished)

Since income in respect of a decedent ("IRD") can be taxed twice (once on an estate's estate tax return and again on the estate's income tax return), it is possible for a single charitable bequest of IRD to produce charitable tax deductions on both returns. However, many estates and trusts that received IRD and also made charitable bequests were not able to claim a charitable income tax deduction. This intermediate program explains the problem and describes the best ways to structure a charitable bequest of retirement plan and other IRD assets (savings bonds, employee stock options, etc.) to secure an offsetting charitable income tax deduction.

Christopher Hoyt is a Professor of Law at the University of Missouri (Kansas City) School of Law where he teaches courses in the area of federal income taxation and charitable organizations. He has served as the Chair of the American Bar Association's Committee on Charitable Organizations (Section of Trusts and Estates) and he serves on the editorial board of *Trusts & Estates* magazine, is an ACTEC fellow, has been designated by his peers as a "Best Lawyer", and was elected to the NAEPC Estate Planning Hall of Fame®.
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?

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!**

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