

August 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 ISSUE

- **NAEPC Welcomes New Councils**
- **Call for Volunteers**
- **Special Council Discount Partnership Program for 54th Annual NAEPC Advanced Estate Planning Strategies Conference**

IN EVERY ISSUE

- **NAEPC Advanced Estate Planning Strategies Conference**
- **Benefits Available to Members of Your Council**
- **Stay Connected with Council Leaders & Executives Via LinkedIn**
- **Officer Update Form / Collecting Formation Dates**



NAEPC Welcomes New Councils

We are delighted to welcome the following councils to membership during 2017:

Berkshire County Estate Planning Council, Inc.
[East Valley Estate Planning Council](#)
[Estate Planning Council of Grand Traverse Area](#)
[Greene County Estate Planning Council](#)
[Santa Fe Estate Planning Council](#)
[Washtenaw Estate Planning Council](#)

Call for Volunteers

NAEPC is actively seeking volunteers for the Council Relations Committee, especially in the following states: Alabama, Arizona, California, Connecticut, Georgia, Idaho, Kansas, Kentucky, Massachusetts, Michigan, Minnesota, Missouri, New York, North Carolina, North Dakota, Oregon, South Carolina, South Dakota, Utah, and Virginia.

The Council Relations Committee is comprised of territory representatives who serve as the liaisons between the individual councils (both affiliated and unaffiliated) and NAEPC. It is the mission of the CRC to deliver the exceptional resources, unsurpassed education and best practices referenced prominently within the association's mission statement to the affiliated councils, as well as to work to assist those councils

interested in membership in NAEPC through the affiliation process. To learn more about volunteering and to download an application, please visit our [website](#) or contact the national office.

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 to learn more about this program and for a copy of the informational flyer and commitment form.



54th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION

November 15-17, 2017 · New Orleans, LA

The Annual Advanced Estate Planning Strategies Conference:

- Educates both councils and their members in a single event
- Provides an enriching attendee experience
- Offers ample networking time intertwined with exceptional multi-disciplinary educational content
- Allows attendees to experience the uniqueness of The Roosevelt New Orleans, our host hotel

We hope you are as excited about participating and sharing information about the program with your membership as we are about planning our 54th annual event! For more information, including a full speaker roster and online registration, please visit www.NAEPc.org/conference.

For more information about the pre-conference sessions for council leaders, including notes from the 2016 event, please visit our [website](#). Don't miss this unique opportunity to visit with - and learn from - other volunteer leaders from across the country!

Member Benefits ·

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 every council meeting, whether verbally or in print, in dues and regular mailings. Brochures are available that can be customized to your council or printed as-is, contact the national office for more details.

Newest Benefit, Just for your Estate Planning Council

M Brands Film, Inc. (M) - Video Production for Estate Planning Councils



Member engagement, retention and gaining youthful members are consistently noted as top priorities for estate planning councils! Is your estate planning council interested in engaging a new group of members or prospective members? Why not consider adding **VIDEO** to your site? If not, you could be turning away a significant percentage of your membership prospects! Video connects you to people in a way that other forms of communication cannot and M is available to help - to learn more about M, watch the welcome video [HERE](#).

Through a value partner arrangement with NAEPC, [M](#) is offering video production services to affiliated local estate planning councils through September 30th for just \$99. Through the web, M will help you create an “explainer” video for your website, social media, and communications. In just 20 minutes to shoot and a 2-week turn-around, M will provide you with a 1-minute video of precise and tailored content for your website, social media, and auto signature. Your council may wish to create video to:

- Recruit new members
- Share a warm welcome message from the President
- Ensure all members are maximizing their experience by taking full advantage of the benefits

To set up a convenient free-video assessment of your website and video needs, please schedule at: <https://secure.scheduleonce.com/LeeMaddox>. If you have questions, either ring 415-404-9276 or email loyalty@mbrands.co.

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Click on the links below to browse the list of all 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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The Association of Choice for Estate Planning Professionals