September 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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October 15, 2014 Webinar ·

3:00 pm - 4:00 pm ET
Pre-conference Sneak Peek!
Increasing Client Receptivity from The Right Side of the Table *with* **Todd Fithian**

You are not a commodity. The problem, however, is that the market thinks you are. Our industry is an interesting one, a fascinating one. Most advisors we've met either knowingly struggle with being viewed as a commodity, or unknowingly struggle with actually being a commodity. There are hundreds of thousands of people across the country purporting to do exactly what you actually do; even if that's not really what they're doing. That's why it's so important to decide to draw the line once and for all; to ensure you are seen for the value you bring. There are many things you can do about it, and that's why we want to share a bit of our Legacy magic that will help things shift.

Todd Fithian is a 20-year veteran of the financial services industry. Following in the footsteps of three generations, he knew at an early age his calling was not only to work in the industry, but to work to improve it as well. A lifelong entrepreneur, Fithian formed his own wealth advisory firm in Boston soon after graduating from The University of Massachusetts, later joining forces with his late brother Scott to form The Legacy Companies, a professional training and consulting organization. Legacy's turn-key systems and processes are designed to enhance the way wealth advisors engage clients by clarifying first what and why a client wants to accomplish, before jumping into how to solve it. Fithian calls this "above the line conversations." He has consulted and trained thousands of advisors, several large financial institutions, and families in the United States, Canada, UK, and Australia in his unique approach to planning. Today, as the managing partner of Legacy, Fithian provides the vision and leadership for his team. In 2007, Fithian co-authored his first book The Right Side of the Table: Where Do You Sit in the Minds of the Affluent and in 2011 he wrote The Future of You: Providing Clarity Where Life Intersects Wealth, in collaboration with 19 members of his Legacy Wealth Coach network. His work has been published in several trade magazines and most recently The Wall Street Journal and USA Today. Fithian is nationally recognized for his contributions to the industry and is a frequent speaker at industry conferences. He currently serves as a board member of The American College, Chartered Advisor in Philanthropy® program, and is president of the International Association of Advisors in Philanthropy. [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.

Registration Fee

• $40 / Accredited Estate Planner® designee (dues must be current at the time of registration)
• $60 / member of an affiliated local estate planning council or at-large member of NAEPC
• $100 / individual non-member
• $250 / council meeting or group gathering

Upcoming & Past Programs

The full list of upcoming and past programs can be found on our website. Past programs are available for purchase at the live registration rate.

National Estate Planning Awareness Week ·

October is just around the corner! Has your council considered getting involved with National Estate Planning Awareness Week?

NAEPC offers a kit for those councils that wish to get involved, but aren't ready to plan a public outreach event in their home community. Packed with sample documents, email text, and letters, your council can quickly and easily help to "get the word out" to members and the local community, information can be found HERE. On this page you can also learn more about The NAEPC Education Foundation and its mission and vision.

We are very excited to announce that a webinar is being planned just for consumers/the public on Monday, October 20, 2104 to kick off National Estate Planning Awareness Week! "Estate Planning in 12 Easy Steps" will be offered to the public by Martin M. Shenkman, CPA, PFS, MBA, JD, AEP® (Distinguished) on October 20th at 3:00 pm ET. Click HERE to be redirected to event details.

51st Annual Conference ·

November 5 – 7, 2014· San Antonio, Texas

BREAKING NEWS!

- The early bird discount has been extended until September 26th – don't delay!
- The full program brochure has been released and can be found HERE.

The November 5 - 7, 2014 event in San Antonio is sure to be every bit as successful as our 50th annual celebration; we hope to see your council well-represented at the event.

We ask for assistance from your council in three ways:

- Please deliver the recently-received supply of brochures to your general membership. If you need additional copies of the registration material to distribute at your upcoming council meetings, please call or email.

- If your council is not participating in the "Every Council Campaign," but would be willing to allow us to email or send hard-copy brochures to your membership, or if you are willing to email the file from your office, please contact Eleanor M. Spuhler at the NAEPC office to facilitate the process. We will accommodate your needs with regard to member privacy!
- Finally, we would like to personally ask your board to consider being the spokespersons within your organization by promoting attendance at the 51st Annual Conference to all of your members.

We often receive questions about why a council should send a leader to the annual conference. The answer is simple – Council Leadership Day is the single best opportunity to receive informative updates from both NAEPC and The NAEPC Education Foundation and to participate in valuable leadership development sessions. An attendee can expect to interact with fellow volunteer leaders, attend breakout sessions designed for sharing best practices, and learn about ongoing NAEPC programs and services available to the council and their membership. Please consider sending a board member to represent your council this year.

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!

Best Practice Tidbit ·

Is your council within a reasonable distance of other councils and related professional associations? Why not share your meeting information with them or co-host an event? For more information on this issue, visit our website and download the "Building Relationships with Nearby Councils" document.

Looking for additional best practices and tidbits? Visit the "Referral Lists" page of the website built just for you – council leaders! Looking for guidance on a particular issue? Please contact our national office – we stand ready to assist!

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.

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.

New Benefit

FWM FamilyWealthMap™

View Client's Entire Estate

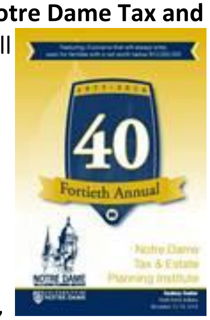
Family Wealth Map aggregates financial and non-financial assets and liabilities to create individual and combined net worth statements, or "Maps". Its ability to handle complex estate structures with multiple family members and generations, legal entities (e.g., trusts, corporations, partnerships), and partially owned assets sets Family Wealth Map apart in the market place. Maps can be shared between clients and their team of advisors to ensure that all are working from the same set of current and complete information. This SaaS program includes a robust and customizable document storage feature that is conveniently attached to each item on the Map. With one click, Map documents can be securely downloaded, viewed, printed, sent and received. Imagine…all the information you need in one secure place! Read more…

Existing Benefits

ABA Book Publishing / The ABA Checklist for Family Heirs…
Acquire Direct Marketing
American Bar Association Paralegal Program
American Dream Planner LLC
Amicus Creative Media & Legal Vault
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

We are also most excited to provide you with information about the upcoming 40th Annual Notre Dame Tax and Estate Planning Institute, November 13-14, 2014, South Bend, IN. The 40th Annual Institute will present topics relevant for all individuals, even those not exposed to the estate tax because of the high exemptions. Several sessions are designed to evaluate financial products and planning techniques so that one can better understand and evaluate these products and proposals in determining not only the tax and financial advantages they offer, but also their limitations.In addition, the Institute offers topics not found in most estate planning CE programs such as protecting the elderly from scams and exploitation. As part of the objective of refreshing areas that can expand one's practice, a session will review the income tax consequences of debt cancellation, foreclosures, and debt restructuring.Recognizing the importance of the income tax, the Institute will continue to devote sessions to income tax planning techniques clients can use immediately. Download the full conference brochure HERE.



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.

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