

September 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.

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NAEPC Welcomes New Affiliated Local Councils in 2015!

We are thrilled to welcome the following new councils to membership in 2015:

Central Virginia Estate Planning Council
Coral Gables / South Dade Estate Planning Council
New Mexico Estate Planning Council, Inc.
San Fernando Valley Estate Planning Council
West Broward Estate Planning Council, Inc.
Western Dakota Estate Planning Council
Winnebagoland Estate Planning Council
Young Professionals Estate Planning Council of Tampa Bay

September 9, 2015 Webinar, Please Share with Your Members

Wednesday, October 14, 2015 3:00pm - 4:00pm ET

Subchapter J (Income Tax of Trusts and Estates) – The Forgotten Tax

Jeffrey N. Pennell, JD

The income taxation of trusts, estate, grantors, and beneficiaries (Subchapter J) is an odd backwater for estate planners because it is at once the tax that affects most estate plans, the one the government seems to ignore in the main, and (perhaps therefore) the one that we hardly ever teach or study. Fiduciary entities are subject to the highest income tax rates and enjoy the lowest exemptions, yet there are few "experts" among us and even less planning devoted to these realities. This session will focus first on the basics of Subchapter J and then delve a bit more into specifics of planning with intentionally

defective grantor trusts, especially including the myths and hype surrounding them. This is an intermediate/advanced program.

Jeffrey N. Pennell is the Richard H. Clark Professor of Law at Emory University School of Law in Atlanta. He is a member of the American Law Institute and an advisor for the Restatements of Wills and Other Donative Transfers, and of Trusts, a former member of the council of the Real Property, Trust Estate Section of the American Bar Association, an academic fellow and former regent of ACTEC, and an academician of The International Academy of Estate and Trust Law. His various publications include student and practitioner texts, tax management portfolios, articles, institute chapters, and he is the successor author of Casner Pennell on Estate Planning (6th ed.).

[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.

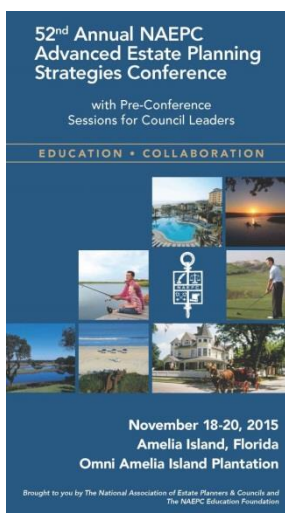
Registration Fees

- \$40 / Accredited Estate Planner® designee
- \$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



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.



- 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
- Private educational session just for Accredited Estate Planner® designees
- Competitive registration fee with most meals included
- Reduced registration fee for estate planning council members

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.

How Can Our EPC Get Involved?

- Send a member of your executive committee or board and council staff to [Council Leadership Day](#). (Paid administrators attend the program with no registration fee!)
- Set a goal to have at least 10 regular members of your council attend the Technical Education portion of the program – plan a special “meet and greet” while together in Florida!
- Include the full conference brochure in your council dues mailings and email messages.
- Distribute copies of the conference brochure at remaining meetings or as the council season gets started in the fall.
- Explain the relationship between NAEPC and your EPC at council gatherings.

What is Council Leadership Day, Anyway?

Each year, in conjunction with the annual conference, the NAEPC provides one full day of education and leadership sessions just for the board / officers of our affiliated local councils; this event is called Council Leadership Day. NAEPC recommends that at least one officer at the vice-president level or below attend along with the council’s staff member. The morning is dedicated to the annual meetings and informative updates from both NAEPC and The NAEPC Education Foundation, while afternoon sessions are committed to leadership development. The attendee can expect to interact with fellow volunteer leaders, attend breakout sessions designed for idea sharing & growth and learn about ongoing NAEPC programs and services available to the council and their membership. The majority of this day is dedicated to open roundtable discussions with leaders of councils of like size facilitated by volunteers who are also board members from their home council. Click [HERE](#) to see the talking points from 2014, session notes by size, and PowerPoint presentation from the annual meetings.

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](#)
- [American Bar Association Paralegal Program](#)
- [Amicus Creative Media](#)
- [Bloomberg BNA's Art of the Estate Tax Return by Keith Schiller](#)
- [International Association of StoryKeepers \(I-ASK\)](#)
- [Klark Proposal Software](#)
- [Konica Minolta Business Solutions](#)
- [Lawgic, LLC](#)
- [LegacyQuest, LLC](#)
- [Legal Binder Now \(LBN\)](#)

- [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.](#)
- [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](#)

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.)

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!

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The Association of Choice for Estate Planning Professionals