

September 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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### Message from Council Relations Committee Chair Kit MacNee, CFP®, CRPC®, AEP®, CSPG



The Council Relations Committee again thanks those councils that submitted applications for the 2016 Walter Lee Davis, Jr. & Leonard H. Neiman Council of Excellence Award. The sub-committee is so excited to recognize both Council of Excellence and 5 Star award [recipients](#) during [Council Leadership Day](#) at the [53<sup>rd</sup> Annual NAEPC Advanced Estate Planning Strategies Conference](#) this November at the Wigwam!

We are also very excited to note that two new councils have joined NAEPC in recent months! Please join us in welcoming Eastern Idaho Estate Planning Council back to membership and the Estate Planning Council of San Gabriel Valley, a brand new affiliate! We are quickly approaching 270 affiliated councils – a growth of nearly 40 councils in just under 5 years!

Finally, it is with great pleasure that I announce a new initiative for 2017 – Regional Leadership Days! Under the guidance of one of NAEPC's newest board members and task force chair, Lawrence J. Macklin, Esq., CPA, AEP®, NAEPC will be hosting three one-day Leadership Day programs during 2017. The events are slated to take place in Columbus, OH, Wilmington, DE and Orlando, FL late April or early May. Watch this newsletter for more details as they become available.

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

November 16-18, 2016

Litchfield Park, Arizona (near Phoenix/Scottsdale)

**The early bird discount expires September 30th!**

Please 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 16<sup>th</sup>) and two full days of continuing education for every estate planning discipline (Thursday, November 17<sup>th</sup> & Friday, November 18<sup>th</sup>). The Annual Conference is open to all estate planning professionals, including every member of your EPC!

Reasons for your council to send an officer & council administrator / executive to Council Leadership Day:  
*To learn more about Council Leadership Day, and to see the highlights from 2015, click [HERE](#).*

- 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

Reasons for your members to attend:

- Two full days of multi-disciplinary education that compliments a council's yearly calendar of events
- 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

For full program information, including the full registration brochure, please visit [www.NAEPC.org/conference](http://www.NAEPC.org/conference).

**September 14, 2016 Webinar, Please Share With Your Members**

Wednesday, October 19, 2016 3:00pm - 4:00pm ET

Tricky GST Issues

David A. Handler, JD, AEP® (Distinguished)

This intermediate to advanced program will explain some of the more complex rules surrounding allocation and use of the GST exemption and the GST Tax, and how to apply those rules and minimize the tax. Mr. Handler will cover "everyday" scenarios that will apply to most estate planners. [REGISTER HERE](#)

David A. Handler is a partner in the trusts and estates practice group of Kirkland & Ellis LLP. Mr. Handler is an ACTEC fellow and a member of the professional advisory committees of several non-profit organizations, including the Chicago Community Trust, The Art Institute of Chicago, The Goodman Theatre, WTTW11/98.7WFMT (Chicago public broadcasting stations) and the Jewish Federation of Metropolitan Chicago. He is one of only 16 U.S. lawyers (as of 2015) ranked in "Band 1" by Chambers USA in the wealth management category, is listed in The Best Lawyers in America®, (trusts and estates) and its 2015 Trusts and Estates "Chicago Lawyer of the Year", in the Guide to the World's Leading Trusts and Estates Practitioners, in Who's Who Legal: Private Client, received the Austin Fleming Distinguished Service Award from the Chicago Estate Planning Council in 2015 and was identified as one of the top 100 lawyers in Illinois in the 2006 list of

“Illinois Super Lawyers.” Leading Lawyers Magazine has listed David as one of the “Top Ten Trust, Will & Estate” lawyers in Illinois as well as a “Top 100 Consumer” lawyer in Illinois. David was named a Trusts & Estates Trailblazer by The National Law Journal in 2016. He is an Editorial Advisory Board Member of Trusts & Estates Magazine for which he has written the monthly “tax update” column for more than 10 years.

#### 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 [eleonor@naepc.org](mailto:eleonor@naepc.org). **Thank you!**

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*The Association of Choice for Estate Planning Professionals*