

September 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.

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NEW! Scan this message for **[HOT TOPICS]**!



## Special Council Discount Program for 54<sup>th</sup> 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! Read more about the conference below.

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 active Accredited Estate Planner® designee discount! 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](mailto:conference@naepc.org) to learn more about this program and for a copy of the informational flyer and commitment form.

## Webinars

*Tired of the same old meeting format?*

*Considering new programming ideas?*

*Trying to engage younger members?*

As you create your programming schedule for the upcoming season, why not consider adding a webinar or two? Programming is consistently noted as a key component to member satisfaction, growth, and retention and distance-learning programs are a great way to bring your EPC high-caliber speakers with little or no cost. The Robert G. Alexander Webinar Series is available to councils for live or on-demand\* group showings. Councils have reported offering the webinars as a regular part of their schedule, for special “meet up” brown bag events, and even as a free member benefit or special program for AEP® designees. Contact the NAEPC office today to learn more about your options and how group webinars can enhance your EPC! **[HOT TOPIC]** All councils can receive one complimentary webinar each calendar year!

*\*Programs can be shown at a date and time chosen by the council as long as it is at least 48 hours after the live broadcast.*

### **Upcoming Webinar, please share with the members of your council!**

Wednesday, October 11, 2017 3:00pm - 4:00pm ET

COMPLIMENTARY SPONSORED WEBINAR: Integrating Asset Protection Planning Into Your Estate Planning Practice with Douglass S. Lodmell, JD, LL.M., Managing Partner & Co-Founder, Lodmell & Lodmell

Join our presenter as he shares the tools and information you need to educate your clients in this complex area of law and shares his unique insights on how to make AP a core component of your practice. This is an intermediate program.

Register [HERE](#) or learn more at <http://www.naepc.org/events/webinar>.



### **54<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION**

November 15-17, 2017 · New Orleans, LA

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

Please consider joining us in Louisiana 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 15<sup>th</sup>) and two full days of continuing education for every estate planning discipline (Thursday, November 16<sup>th</sup> & Friday, November 17<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 2016, click [HERE](#).*

- Learn creative ideas for membership growth and retention, including how to find/engage younger members
- Acquire new programming ideas
- Expand your perspective on what similarly sized or located councils are doing on a daily basis
- Gather information about how NAEPC can assist the council

**[HOT TOPIC]** Reasons for your members to attend:

- Two full days of multi-disciplinary education offered by nationally-known presenters that complement a council's yearly calendar of events
- Up to 14 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 program information, including the full registration brochure, please visit [www.NAEPc.org/conference](http://www.NAEPc.org/conference). Register by September 30<sup>th</sup> to receive the early bird discount!

#### 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. **[HOT TOPIC] Brochures are available that can be customized to your council or printed as-is, contact the national office for more details.**

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](mailto:eleanor@naepc.org). **Thank you!**

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*The Association of Choice for Estate Planning Professionals*

