

September 2018 Issue

National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter for affiliated local council officers ·

This email is being sent to you as an officer or council executive for your NAEPC-affiliated local estate planning council, all officers on file with NAEPC receive the email.
Please share this publication with your entire board at its next meeting or forward it via email if a meeting is not scheduled soon.

Scan this message for [HOT TOPICS]!

HIGHLIGHTS

- Early Bird Discount for 55th Annual NAEPC Advanced Estate Planning Strategies Conference Extended through 09/28/18
- Council of Excellence and 5 Star Council Honorees Announced
- Special Complimentary Webinar, October 17th

IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference: November 6 - 9, 2018
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



Early Bird Discount for 55th Annual NAEPC Advanced Estate Planning Strategies Conference Extended

[HOT TOPIC] The early bird discount for the Annual Conference has been extended through Friday, September 28th. Please register your council's leadership attendees by Friday to take advantage of the discount. Learn more about the conference within this newsletter or online at www.NAEPC.org/conference.

Council of Excellence and 5 Star Council Honorees Announced

[HOT TOPIC] Please join us in congratulating the winners of the 2018 Council of Excellence Awards:

Extra-Small/Small Council

Estate Planning Council of Bergen County, Inc.

Medium Councils

Estate Planning Council of Central New York
Greater New Jersey Estate Planning Council, Inc.
Nassau County Estate Planning Council
Spokane Estate Planning Council

Large Council

Baltimore Estate Planning Council

Extra-Large Council

Estate Planning Council of Cleveland

We also celebrate with those Estate Planning Councils honored with “5 Star” status, recognizing achievement and success in the daily operation of a successful association:

Extra-Small/Small Council

Financial & Estate Planning Council of Huntsville

Medium Councils

Central Arizona Estate Planning Council
Estate Planning Council of Eastern New York
New Orleans Estate Planning Council
Palm Beach County Estate Planning Council
Tulsa Estate Planning Forum

Large Council

Financial & Estate Planning Council of Metropolitan Detroit

Extra-Large Councils

Boston Estate Planning Council
Philadelphia Estate Planning Council

We look forward to celebrating with these councils during the 55th Annual NAEPC Advanced Estate Planning Strategies Conference!

Special Complimentary Webinar

We are very excited to have added a special complimentary sponsored webinar to the calendar in October! Join us on Wednesday, October 17, 2018 from 12:00pm - 1:00pm ET for “Sold a Dream, Woke Up in a Nightmare: Educating Your Clients about a Timeshare’s True Costs” presented by Chuck McDowell, President and CEO of Wesley Financial Group, LLC. **[HOT TOPIC]** Your council can choose to offer the program in a group setting or your members can simply register individually and watch from the comfort of their desk on the live date and time or at a time that fits their schedule. > [Learn more and register](#)



55th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders

November 6 – 9, 2018 · Fort Lauderdale

[HOT TOPIC] The early bird discount expires September 28th!

Please consider joining us in Florida 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, Tuesday, November 6th) and two and one-half days of continuing education for every estate planning discipline (Wednesday, November 7th, Thursday, November 8th & Friday, November 9th). 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 executive to Council Leadership Day:

- 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 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 and one-half days of multi-disciplinary education offered by nationally-known presenters that complement a council's yearly calendar of events
- Up to 17 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 registration brochure, please visit www.NAEPC.org/conference. Register by September 28th to receive the early bird discount!

Robert G. Alexander Webinar Series ·

The Robert G. Alexander Webinar Series provides councils and their members with accessible and affordable multi-disciplinary education. Programs are available live and on-demand (to watch at a time that fits your schedule) and attendees can choose to register for individual programs or for a series subscription. Councils can also register for a group gathering, which provides one feed to be shown to a group gathered together in a single location.

Next Regular Webinar

Blended Gifts for Boomers with A. Charles Schultz, JD
 Wednesday, October 10, 2018
 3:00pm - 4:00pm ET

Major clients of professional advisors are often involved in philanthropy. Most have two personal goals – make their mark through a high-impact gift and be fair to family. They will show extreme gratitude to an advisor who helps them achieve their most important personal goals. The twelve plans in Blended Gifts for Boomers show you how to help clients make maximum impact gifts – part today and the larger gift through their estate. > [Learn more and register](#)

Registration Fees	Individual	Series
Accredited Estate Planner® Designee	\$40	\$280
Junior / Student (Junior or Student member of an affiliated EPC or one who is in the process of attaining the AEP® designation by virtue of being enrolled in a required or elective course at The American College)	\$40	\$280
Member of Affiliated Estate Planning Council / At-Large Member of NAEPC	\$60	\$420
Non-Member	\$100	\$700
Group Gathering (one feed shown in a single location to a group, additional feeds available for \$25)	\$250	\$1,125

Continuing education credit is available at most NAEPC-hosted webinars for Accredited Estate Planner® designees. In addition, a general 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.

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 by your board! Please be sure to mention these valuable services at every council meeting, whether verbally or in print, and within postal mailings. **Brochures are available that can be customized to your council or printed as-is, contact the national office for more details or see a sample [HERE](#).**

Highlighted Benefit

High-Performance Teaming and Professional Collaboration, the LINK Online Course in Collaboration

Your council members have declared a commitment to the team concept of estate planning because they know that this process best serves the client. All too often, a truly collaborative experience escapes even the most seasoned and well-meaning advisor... and that is where the LINK Online Course in Collaboration comes in! Based on the NAEPC Model for Collaboration, LINK digs into best practices, helping to balance communication, coordination, and cooperation and turn those elements into a true collaborative experience that benefits the client and sets you apart from others.

LINK is a self-paced, 9-module course that students complete at their leisure. Segments are short and concise, the program is easy to follow, completion is on the student's schedule, and your council's members have access to a reduced enrollment fee.

Encourage your council members to become a Leader > [Learn more about the LINK Online Course in Collaboration](#)

Click on the links below to browse the list of all by category, or see the [full list of opportunities](#).

- [NAEPC-Provided Benefits](#)
- [Educational Opportunities](#)
- [Marketing and Website Design Services](#)
- [Presentation Materials and Office Supplies](#)
- [Software](#)
- [Subscriptions and Publications](#)
- [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.

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](#).

Staying Connected Via LinkedIn ·

Does your council want to ask other councils for advice? Looking for ideas for programming?

[HOT TOPIC] NAEPC maintains a group on LinkedIn just for council leaders. Join today to connect with council leaders from across the country and to initiate and participate in council management-specific dialogue! The group is available to current officers and directors of affiliated local estate planning councils. Click [HERE](#) to join (you must have a LinkedIn account to participate.)



NAEPC Minute is an administrative report that does not take the place of *NAEPC News*, the official newsletter of the NAEPC, 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.

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The Association of Choice for Estate Planning Professionals