

September 2019 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

- 56<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference Early Rate Expires Today!
- Exciting Changes to Council Administrator/Executive Session at Annual Conference

### BEST IDEAS CORNER

- Utilizing Your Council Relations Committee Representative
- Emerging Professionals: Engaging Younger Members

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- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



### **56<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders - Early Rate Expires TODAY!**

November 5 - 8, 2019 · Las Vegas, Nevada

[www.NAEPC.org/conference](http://www.NAEPC.org/conference)

Don't miss out on the lowest registration fee! Make sure your council has registered its representatives and please consider sending a message to the membership about the conference and expiration of the early rate.

#### **Reasons for your council to send an officer or officers & the council's executive to Council Leadership Day/the Pre-Conference Sessions for Council Leaders:**

- Learn from and with other council leaders during topic-based sessions called [learning pods](#)
- Acquire new programming ideas and solutions for membership growth and retention

#### **Reasons for your council's members to attend:**

- The conference offers the single best opportunity for your members to grow a national network of estate planning professionals
- Competitive registration fee with most meals included and a reduced rate for your council's members

- Up to 17 hours of continuing education credit during 2 ½ days of multi-disciplinary education offered by nationally-known presenters

Learn more and register at [www.NAEP.org/conference](http://www.NAEP.org/conference) or download the brochure [HERE](#). **[HOT TOPIC] Don't forget to register TODAY to get the early rate!**

### **Changes to Council Executive Sessions at Annual Conference**

Each year, a group of council administrators and executives (paid staff) gather together at the Annual Conference to experience Council Leadership Day and special executive-only events like time with the NAEP Webmaster, a private dinner on Tuesday evening, and a half-day development session on Wednesday morning. This year we are excited to announce changes to the 4-hour executive session that include table discussions based on subjects of interest to those in the role of council staff. Learn more about the topics and see the session agenda [HERE](#). **[HOT TOPIC]** Remember, council executives are always eligible to attend with the registration fee waived!



### **Best Idea Corner ·**

#### *Utilizing Your Council Relations Committee Representative*

The [NAEPC Council Relations Committee](#) is charged with helping affiliated local estate planning councils and their members take advantage of the benefits, programs and services available to all affiliates. Each local council has an assigned representative who serves as a liaison between the council and national board. Please reach out to these individuals as questions arise throughout the year or to learn more about the benefits of affiliation.

#### *Engaging Younger Members*

**[HOT TOPIC]** [Central Arizona Estate Planning Council](#) has an Emerging Professionals Group for members under 40. The council offers three membership scholarships each year and recipients receive a 50% discount on their membership for two years. This is a proven way to increase the number of younger members and to increase retention rates.

Looking for more great ideas? [Review the notes from the Regional Leadership Day events](#) and attend the annual conference!



### **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 and one 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 Webinar**

Wednesday, October 16, 2019 · 3:00 pm - 4:00 pm ET  
**Elder Law and Special Needs Planning with NAEP Estate Planning Hall of Fame® Member Bernard A. Krooks, JD, CPA, LL.M. (taxation), CELA, AEP® (Distinguished)**

This intermediate level program will provide an update on elder law and special needs planning, including how to draft a plan that works and takes into account future incapacity of the client and beneficiaries. Use of trusts will be discussed, as well as appropriate trust distribution standards.

[REGISTER HERE](#) for this webinar | [REGISTER HERE](#) for a series subscription

> [See all upcoming and previous webinars](#)

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 per location)	\$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 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](#).** See the [full list of opportunities](#).

Please remember... all members must utilize a user name/password to access some 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 ·

**[HOT TOPIC]** All councils are encouraged to update NAEPC 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?*

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.

Please reply to this email message if you wish to unsubscribe.

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*The Association of Choice for Estate Planning Professionals*