

October 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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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)

Although the [Annual Conference](#) is just three weeks away it's not too late to register to attend! The Annual Advanced Estate Planning Strategies Conference is planned each year to:

- Educate both councils and their members in a single event
- Provide an enriching attendee experience
- Offer ample networking time intertwined with exceptional multi-disciplinary educational content
- Allow attendees to experience the uniqueness of The Wigwam, the host resort

For program information, including the full registration brochure and online registration, please visit www.NAEPC.org/conference. Information about what happens during the pre-conference sessions, also known as Council Leadership Day, can be found on our [website](#).

Programming Resources

NAEPC offers two resources to those affiliated local councils that are searching to fill their yearly programming calendar.

Option #1

The first option, our "[Online Library](#)" is populated by those individuals who have expressed an interest in

speaking to local councils. Each speaker listing shows a bit about their topics and area of expertise, and most also include a flyer of general information. ***New within the online speaker library:***

Added: Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP® / BNY Mellon

Justin's topics include federal income taxes, federal transfer taxes, trends in estate planning, the psychology of planning, planning for divorce and/or second marriage, using charitable trusts, planning for charitable transfers, income tax planning for estates & trusts, and many more

Amended: Steven S. Zeiger CEBS, TEP

New Presentation, October 2016: Instructions / Case Study to Perform a Life Insurance Review that is Compliant with Industry Regulations (Available to EPCs in the NY, NJ, CT areas)

COUNCIL REFERRALS ARE APPRECIATED! Please encourage those who were well-received by your EPC to apply to be added to the online speaker library. Instructions to do so can be found [online](#).

Option #2

The second programming option, the “No Charge Speaker Program,” offers councils an opportunity to have a speaker from NAEPC come and present both a technical discussion and a bit about the benefits available to your members through the council's affiliation with NAEPC. This program is updated yearly and can the 2016/17 brochure can be found [HERE](#).



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 eleanor@naepc.org. **Thank you!**

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The Association of Choice for Estate Planning Professionals