

October 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.

NEW! Scan this message for [HOT TOPICS]!

HIGHLIGHTS

- Stay Connected with Council Leaders & Executives Via LinkedIn
- Special Complimentary Webinar on October 31, 2017

IN EVERY ISSUE

- NAEPC Advanced Estate Planning Strategies Conference - Coming Soon!
- Benefits Available to Members of Your Council
- Officer Update Form / Collecting Formation Dates



Staying Connected Via LinkedIn ·

Does your council want to ask other councils for advice? Looking for ideas for programming? NAEPC maintains a sub-group of the primary association group on LinkedIn just for council leaders. Join today to interact with 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 to current officers and directors of affiliated local estate planning councils. Click [HERE](#) to join (you must have a LinkedIn account to participate.)

Special Complimentary Webinar on October 31, 2017

Tuesday, October 31, 2017 2:00pm - 3:00pm ET

Teaming for Success in Three Legacy Planning Business Models, a complimentary program provided with *Trusts & Estates* and sponsored by the Accredited Estate Planner® designation

Presenters: Philip Cubeta, CLU®, ChFC®, MSFS, CAP®, AEP® - The American College of Financial Services; Thomas C. Rogerson - Wilmington Trust; Martin M. Shenkman, CPA, PFS, MBA, JD, AEP® (Distinguished) - Martin M. Shenkman, P.C.

Moderator: Charles V. Douglas, JD, CFP®, CAP®, AEP® - Cedar Rowe Partners

- Would you agree that traditional transfer tax planning is a discipline under threat?
- Do you feel that legacy planning (integrated wealth management across generations) may be a promising alternative?

- Would you like to learn more?

[HOT TOPIC] In this practical webinar you will learn why teaming is essential for multi-generational legacy planning, and how teaming plays out in three business models: Family Office, Private Bank, and Best of Breed Teams of Independents. Join the panelists and moderator to learn how to position your practice for success in this rapidly changing legacy planning landscape. [REGISTER HERE for this COMPLIMENTARY webinar](#) and make sure to share information about the program with the members of your council!

You, your council, or its members may also wish to join us for the last webinar in the Robert G. Alexander Webinar Series during 2017:

Wednesday, December 13, 2017 3:00pm - 4:00pm ET

A December Guide to the Trump Tax Act: Where We Stand and New Planning Opportunities

Steven J. Oshins, JD, AEP® (Distinguished)

Learn more about this timely program at <http://www.naepc.org/events/webinar> or [REGISTER HERE](#).



54th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION

November 15-17, 2017 · New Orleans, LA

Please consider joining us for 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 15th) and two full days of continuing education for every estate planning discipline (Thursday, November 16th & Friday, November 17th).

[HOT TOPIC] It's not just for council leaders! The Annual Conference is open to all estate planning professionals and was built with every member of your EPC in mind.

Reasons for your council to send an officer & council administrator / executive to Council Leadership Day:

- Obtain new programming ideas
- Acquire creative ideas for membership growth and retention, including how to find/engage younger members
- Learn what similarly sized or located councils are doing on a daily basis during special breakout sessions
- Collect information about how NAEPC can assist the council
- Time with the NAEPC Webmaster

To learn more about Council Leadership Day and to see the highlights from 2016 or the "Talking Points" for 2017, click [HERE](#).

Why your members should attend:

- Two full days of multi-disciplinary education offered by nationally-known presenters that supplement the council's yearly calendar of events that also provide up to 14 hours of national and multi-disciplinary [continuing education credit](#) in two days of sessions
- Network with estate planners from around the country
- Competitive registration fee with most meals included – access to the member rate!

For program information, including the full registration brochure, please visit www.NAEPC.org/conference. Register by October 31st to avoid the late fee!

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. **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.

Officer Update Form / Formation Dates ·

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. If you have not already done so, please take a moment today to email your council name and date of formation to councilservices@naepc.org. **Thank you!**

National Association of Estate Planners & Councils
1120 Chester Ave., Ste. 470
Cleveland, OH 44114
(866) 226-2224 - fax (216) 696-2582
admin@naepc.org

The Association of Choice for Estate Planning Professionals