November 2014

National Association of Estate Planners & Councils Minute

…the monthly administrative report for affiliated local council leaders

(This email is being sent to you as an **officer on record** or **administrator** for your NAEPC-affiliated local estate planning council, all officers on file receive the email. You are encouraged to share part or all of this publication with your entire membership. *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 online at http://www.naepc.org/events/news.)

Please share this publication with your entire board at the next council board meeting.

IN THIS ISSUE

- December 10, 2014 Webinar, Please Share with Your Members
- 51st Annual Conference Recap

IN EVERY ISSUE

- Best Practice Tidbit
- Benefits Available Members of Your Affiliated Local Council
- LinkedIn SubGroup for Council Leaders Only
- Officer Update Form

December 10, 2014 Webinar ·

3:00 pm - 4:00 pm ET
Avoiding the Twilight Zone of Estate Administration
M. Holly Isdale, JD

If you died last night, would your family, partners, executors, or clients know how to access your online information - and more importantly, what to do with your digital footprint? Our lives are increasingly online - our correspondence is often virtual, our “assets” now include online content, IP addresses, and music, books or memorabilia that exist only in the "cloud." The average home has 6 or more internet connected devices. To access these, most adults use at least five unique passwords that update at least quarterly. Could someone find, much less manage, all of your information if you died? What are the planning considerations for these unique assets? Attend this webinar to learn what structures or language you should be adding to your client's wills, revocable trusts, HIPAA documentation, and powers of attorney. The topic of digital death encompasses issues of access to data, in all its forms, as well as the problems of collecting, valuing or transferring these digital assets. Understanding the risks to investments, businesses and families from failing to plan for “digital death” is critical to preserving these assets intact. The webinar will also review the limits on digital assets, impediments to transferring assets, the current state of the law, the recently released Uniform Fiduciary Access to Digital Assets proposed legislation, and will recommend action steps advisors can take help clients organize and protect their digital assets.

About our Speaker:
Holly Isdale founded Wealthaven in 2010 to provide clients with a single point of contact for the oversight of their wealth management needs. After 20-plus years on Wall Street, she was frustrated by the fact that wealthy families, despite hiring the best attorneys, accountants and investment teams, still could not achieve their financial goals, primarily due to lack of coordination and execution among the experts. Holly created Wealthaven to provide clients with high level strategic planning, hands-on oversight and conflict-free advice. Holly has worked with entrepreneurs and business owners for her entire career – from initial funding to IPOs or mergers, through succession planning and even last rites. This in-depth knowledge of tax, investments, estate planning, family

governance, philanthropy and just plain common sense, allows her to help families to identify their goals, create an actionable plan and to deliver results. A graduate of Cornell University and of Boston University School of Law, Holly began her career as a corporate tax attorney but left the active practice of law in 1994 to build and lead the estate and financial planning practices for several top Wall Street firms, including JPMorgan, Goldman Sachs, Lehman Brothers, and Bessemer Trust. Holly serves on the board of Family Firm Institute, the global organization for family business consultants. She is a member of the American Bar Association's Real Property, Trust and Estate Committee, the Purposeful Planning Institute, Philadelphia Estate Planning Council, Society of Trust and Estate Professionals and several other organizations. She is a frequent speaker on issues relating to family, tax and transition issues as well as philanthropic considerations. Holly was recognized as a finalist for the Family Business Advisor of 2013 award from STEP (Society of Trust and Estate Professionals). REGISTER HERE

Continuing Education Credit

Continuing education credit will be available at each webinar for Accredited Estate Planner® designees. In addition, a 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.

Registration Fee

- $40 / Accredited Estate Planner® designee (dues must be current at the time of registration)
- $60 / member of an affiliated local estate planning council or at-large member of NAEPC
- $100 / individual non-member
- $250 / council meeting or group gathering

Upcoming & Past Programs

The full list of upcoming and past programs can be found on our website. Past programs are available for purchase at the live registration rate.

51st Annual Conference Recap ·

The 51st Annual Conference of the National Association of Estate Planners & Councils and The NAEPC Education Foundation took place from November 5th – 7th in San Antonio, Texas. A recap of the week of activities follows below:

Monday, November 3rd

The NAEPC board of directors welcomed those individuals selected by the nominating committee to take a place on the 2015 association board upon approval by the membership. The current executive committee participated in a new board member orientation followed by a welcome reception with the entire board.

Tuesday, November 4th

The board of directors participated in its second face-to-face board meeting during 2014. The group was hard at work discussing the future direction of NAEPC, new initiatives, and preparing for the three days of activity that followed.

Wednesday, November 5th

After 3 years of planning, the 51st Annual Conference officially kicked off with Council Leadership Day! Leaders from nearly half of the councils affiliated with NAEPC enjoyed breakfast with one another, which was followed by the Annual Meeting, where new officers and directors were elected, and reports from NAEPC. The day also came complete with a new agenda that focused on benefits NAEPC offers to member councils, those that are available to members of councils, new initiatives, and two very special announcements – the release of the "Council of Excellence" Award and an upcoming 21-day free trial to the Leimberg Information Services program just for councils. (You can expect to hear more about these programs in the weeks to come.) Leaders then enjoyed a luncheon with conference sponsors and exhibitors followed by private sessions where leaders from councils of like size shared best practices and new ideas. After a long day of learning and sharing, a welcome reception took place within the exhibit hall along with a special private dinner for council administrators in attendance.

Thursday, November 6th

The educational portion of the 51st Annual Conference kicked off with a 2-mile fun run & walk bright and early at 5:45 am! This was followed by breakfast, a sponsor bonus session at 7:00 am, the continuation of the council administrator meetings, educational sessions with 3 outstanding speakers, lunch with conference sponsors & exhibitors, and 3 more exceptional educational sessions. The day concluded with a very special private session just for active Accredited Estate Planner® designees.

Friday, November 7th

The week of events began drawing to a close, but not before one more day of exciting activities! A sponsor bonus session kicked off the day at 7:00 am. This was followed by the association's annual awards ceremony where individuals were inducted into the Estate Planning Hall of Fame® and the Hartman Axley Lifetime Service Award was presented to the family of Robert G. Alexander. There were 3 educational sessions prior to lunch with conference sponsors & exhibitors and 3 following. The day concluded with remarks by the association's incoming president, Jordon Rosen, and an invitation to attend the 52nd Annual Conference scheduled from November 18th – 20th in Amelia Island, Florida.

We hope to see your council strongly represented in 2015 – please begin thinking about sending both a board member and the council's staff to Council Leadership Day as well as promoting the educational component to your entire membership!

Note for attendees of the 51st Annual Conference: All of the information presented during Council Leadership Day will soon be available HERE.

Best Practice Tidbit ·

If the recap of the 51st Annual Conference located above piqued your interest and you are interested in sending a representative next year, read our handy reference document "Council Leadership Day – Why Should Our Council Send a Representative?"

Looking for additional best practices and tidbits? Visit the "Referral Lists" page of the website built just for you – council leaders! Looking for guidance on a particular issue? Please contact our national office – we stand ready to assist!

Member Benefits, Programs & Services Recap ·

Members of the National Association of Estate Planners & Councils and members of your affiliated local council have access to a wide array of benefits, programs & services 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 benefits 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.

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.

New Benefits

Safe by Estate Assist: Your Online Safe Deposit Box

Safe by Estate Assist protects your financial and digital assets, as well as important life documents. This includes life insurance, loans, bank, brokerage, 401K, social media, email accounts, as well as your will, power of attorney, and more. Our product allows members to securely and accessibly store account information and documents, while making them available on the web or your mobile device.

With user-friendly, step-by-step workflows to set up and manage an encrypted and electronically stored digital estate, Safe's system replaces old paper binders, messy files, hand written notes, and password locked spreadsheets. We allow members to share their asset information with one or more trusted people, while living or upon incapacitation or death. This ensures that heirs get the money, property, and life insurance benefits that they deserve, including items they personally may not have been aware of.

NAEPC members can receive a 33% discount on all Safe plans by visiting Estate Assist, clicking "Get Started Free" and registering for a Safe account. If you're interested in partnering with Estate Assist to provide Safe to your clients, please reach out to us at partnerships@estateassist.com**.**

Society of FSP's Arizona Institute, January 18-22, 2015 - Phoenix, AZ

ATTENTION NAEPC MEMBERS - ESCAPE WINTER'S WORST!

Join fellow estate planners and financial advisors at the Society of FSP's Arizona Institute on January 18-22, 2015, in Phoenix. NAEPC members, if registered by December 22, 2014, can save $200 off the regular non-member price.

Attendees will hear Jim Frank, JD, LLM, on "Estate Planning and Portability," Gerry Beyer, BA, PhD, LLM, JSD, on "Estate Planning for Non-Human Family Members," and more.

- Earn up to 18 CE credits.
- Expand your network of elite professionals and grow your practice.

For complete program information and to register go to www.arizona-institute.com or call FSP Member Services @ 800-392-6900 (M-F, 9 am-4:30 pm ET). Use promo code NAEPC**.**

Existing Benefits

ABA Book Publishing / The ABA Checklist for Family Heirs…
Acquire Direct Marketing
American Bar Association Paralegal Program
American Dream Planner LLC
Amicus Creative Media & Legal Vault
BizActions LLC
Business Valuation Resources, LLC
Cards for a Cure
Charitable Planning Desk Reference for Advisors / Strategic Philanthropy
Cloudia Assistant
CrummeyService
Discuss Directives, LLC - Heart2Heart Workbook & Deck of Cards
DocuBank

Estate Planning Smarts / Pensworth
EstatePlanningBinders.com
Family Business Magazine
Family Wealth Map
Fiserv Investment Services
Florida Domicile Handbook
International Association of StoryKeepers (I-ASK)
International Genealogical Search Inc.
Klark Proposal Software
Konica Minolta Business Solutions
Lawgic, LLC
LegacyQuest, LLC
Legal Binders Now (LBN)
My Perfect Will
My Personal DataSafe LLC
NationalUnderwriter.com
Oswald Companies Personal Excess Liability
Ruby Receptionists
Sterling Cut Glass
The Ultimate Estate Planner
Trusts & Estates
Veracity - MTG
Washington Institute for Graduate Studies
WealthManagement.com
Wolters Kluwer Law & Business

LinkedIn Sub-group for Council Leaders ·

NAEPC has launched a sub-group of the general association group on LinkedIn, just for council leaders. Join today to interact with other council leaders from across the country and to receive weekly posts from NAEPC! The sub-group is available only to officers and directors of affiliated local estate planning councils. See you there ~

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 at http://www.naepc.org/assets/national/pdf/council_officer_form.pdf.

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