

December 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.**

#### **SPECIAL ALERT:**

Council dues notices will be mailed shortly after January 1<sup>st</sup> to the contact on record for your EPC. Please make sure to return your dues payment, service fees, and an officer update to NAEPC by March 27, 2015.

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#### **Council of Excellence Award, Recognizing Achievement**

Created in 2014 and launched at the 51<sup>st</sup> Annual Conference, the National Association of Estate Planners & Councils Council of Excellence Award is designed to recognize those councils affiliated with the NAEPC that are positioned toward success. The program criteria were carefully developed with all council sizes in mind by a task force of council leaders, past presidents of NAEPC, and current board members.

The Council of Excellence Award is named for two individuals who truly sought to strengthen the bond between NAEPC and its affiliated councils during their terms on the board. Walter Lee Davis, Jr. served as president of the association in 2008 and was instrumental in forming the Council Relations Committee, a group of volunteer members who are charged with being a liaison between affiliates and the national association. Leonard H. Neiman served the association as a board member for over fifteen years. He worked tirelessly to gather information about estate planning councils from around the country, both affiliated and unaffiliated, and to make contact with their leadership to help explain the benefits of affiliating with NAEPC.

We are very excited to announce that the first awards will be offered in 2015 to councils in five categories – extra-small, small, medium, large, and extra-large. Applications are due by Friday, April 3, 2015. For full program criteria and a downloadable application, please click [HERE](#). Please direct questions to our national office at 866-226-2224 or [admin@naepc.org](mailto:admin@naepc.org).

#### **Leimberg LISI Service Free Trial**

Through a very special arrangement with Steve Leimberg, estate planning councils affiliated with NAEPC have an opportunity to provide their members with the [Leimberg LISI Service](#) at a greatly reduced fee. For more

information about this special council program, click [HERE](#). As a special year-end benefit, we are excited to offer a free “sneak peek” of this service to members of councils that are not currently enrolled in the service from December 15, 2014 – January 12, 2015. Please contact our national office at 866-226-2224 or [LISUpdate@naepc.org](mailto:LISUpdate@naepc.org) for more information about this free trial. Hurry, the trial period ends on January 12, 2015!

### **Councils in the News**

The Charleston Estate Planning Council has awarded the 2014 Lifetime Achievement Award to Peter S. White of Charleston for over 55 years of service to clients, the community and the estate planning profession. He is the first recipient of the award. For more information, click [HERE](#).

Please submit the accomplishments of your council to [admin@naepc.org](mailto:admin@naepc.org) for posting on the national website!



### **Best Practice Tidbit**

Are the members of your council aware of the vast array of benefits they have access to through your affiliation with NAEPC? If not, please consider playing and/or handing out our handy PowerPoint presentation, “[PowerPoint Presentation for Members of Newly Affiliated Councils](#)” at an upcoming meeting.

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.

### **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  
Cludia Assistant

CrummeyService  
Discuss Directives, LLC - Heart2Heart Workbook & Deck of Cards  
DocuBank  
EstateAssist  
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](http://www.naepc.org/assets/national/pdf/council_officer_form.pdf).

National Association of Estate Planners & Councils  
1120 Chester Ave., Ste. 470  
Cleveland, OH 44114  
(866) 226-2224 - fax (216) 696-2582  
[admin@naepc.org](mailto:admin@naepc.org)  
*The Association of Choice for Estate Planning Professionals*