

December 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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The Year in Review

What a year it was! 2016 marked a year of growth and exciting new adventures for NAEPC. We're glad that your EPC was a part of it!

2016 draws to a close with 6 new affiliated councils! Please join us in welcoming Charlotte EPC (FL), Des Moines Estate Planners Forum (IA), Eastern Idaho EPC (ID), EPC of San Gabriel Valley (CA), Medina County EPC (OH), and South Plains T&EPC (TX).

The [Accredited Estate Planner](#)[®] and [Estate Planning Law Specialist](#) designation programs continue to grow and it is with much excitement that the 2,000th AEP[®] designee will soon be welcomed into membership. There was also a significant increase in usage of the [Council Nominated AEP](#)[®] program during 2016 – if your EPC has not yet participated, please consider doing so in the coming year.

NAEPC exhibited at several conferences during the year, including: AICPAs Personal Financial Planning Conference in January in Las Vegas, Advisors in Philanthropy Conference on Philanthropy in May in Chicago, NAIFA Performance + Purpose Conference in September in Las Vegas, and WealthCounsel Symposium in Washington, DC in October (joint exhibition with the Estate Law Specialist Board). Why does NAEPC exhibit? It's simple; we strive to spread the message about the benefits, programs and services offered through the national network of affiliated estate planning councils and NAEPC!

The association continued to develop programs and events with regard to multi-disciplinary teaming during 2016. You can expect to learn much more on this, the association's core value, during the coming months.

And finally, if you haven't already seen them, please take a look at the newly-revised [mission & vision statements](#).

Robert G. Alexander Webinar Series

The Robert G. Alexander Webinar Series provides estate planners with accessible, high quality, multi-disciplinary education. Programs are available live and on-demand and live programs typically take place on the second Wednesday of each month at 3:00 pm ET. Programs can be purchased individually or by series subscription, which offers substantial discounts and a link for every program during calendar year 2017.

	<i>Individual Program</i>	<i>Series Subscription</i>
Accredited Estate Planner® designee	\$40	\$280
Member of a council or at-large NAEPC member	\$60	\$420
Non-member	\$100	\$700
Group gathering	\$250	\$1,125

The program for 2017 is nearly complete and includes:

Rethinking Life Insurance Valuation for Seniors (complimentary sponsored program)
Jon B. Mendelsohn

Special January Addition: DOL Fiduciary: When they're Running You Out of Town - Get at the Head of the Line and Make it Look Like a Parade!
Kim O'Brien & Richard Weber, MBA, CLU®, AEP® (Distinguished)

Powers of Appointment
Turney Berry, JD, AEP® (Distinguished)

Negative Basis Partnership Freeze
Jerome M. Hesch, MBA, JD, AEP® (Distinguished)

Valuation Issues in Estate Planning
David Adams

Effective Estate Planning for Diminished Capacity; Can You Really Avoid Guardianship
Diana Zeydel, JD, LL.M., AEP® (Distinguished)

A Potpourri of Planning Ideas with Life Insurance
Lee Slavutin, MD, CLU®, AEP® (Distinguished)

Alternatives to Self Settled Trusts
Gideon Rothschild, JD, CPA, AEP® (Distinguished)

The Perfect Modern Trust Including Income Tax Sheltering Opportunities
Dick Oshins, JD, LL.M., MBA, AEP® (Distinguished)

Estate Planning after the 2704 Treasury Regulations: Planning with the New Rules
Steve Oshins, JD, AEP® (Distinguished)

Continuing education credit is available at each webinar for Accredited Estate Planner® designees. In addition, a general 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. It is the responsibility of the attendee to determine whether their state, discipline, or designation will allow one to self-file for a distance-learning program.

For complete details about the Robert G. Alexander Webinar Series and registration links, click [HERE](#).

Save the Date – NAEPC Visits New Orleans!

The 54th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders is scheduled from November 15-17, 2017 in New Orleans, Louisiana. It's not too early to plan to attend!

Attendees will experience everything the NAEPC Advanced Estate Planning conference is known for – good company, great food and exceptional educational content – while visiting The Roosevelt, a Waldorf Astoria Hotel. Steeped in history, The Roosevelt will deliver a glimpse into New Orleans history through the eyes of this [recently-restored property](#). Registration opens April 2017!



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