

December 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.

HIGHLIGHTS

- Message from Council Relations Committee Chair Kit Mac Nee
- 2018 Webinar Schedule & Series Subscriptions Now Available
- New Member Benefit - LINK: Online Education brought to you by The Legacy Companies and sponsored by NAEPC

IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference – November 6 - 9, 2018
- Benefits Available to Members of Your Council
- Officer Update Form / Collecting Formation Dates
- Council Leadership Group on LinkedIn

Scan this message for **[HOT TOPICS]**!



Message from Council Relations Committee Chair Kit Mac Nee



What an exciting year this has been! The committee has been incredibly active positioning itself for the future with a new committee mission and member job description, a fresh territory alignment that ensures that all volunteers have a region of reasonable size, and we've welcomed many new members during the year – all of this to make sure that we are helping every affiliated local council take advantage of the wealth of benefits, programs and services that NAEPC offers! Our job is not done, however. **[HOT TOPIC]** The committee is still in need of volunteers in several regions throughout the country. Learn more about [volunteering with NAEPC](#) on our website.

It's a great time of year for your board to begin thinking about the 2018 Council of Excellence Awards! Whether the council chooses to apply for the award or simply uses the information within to gauge progress and success, completing the application is a great way to move your council to the next level. Watch your email and our website for more information on the release of the application, expected in January.

2018 Webinar Schedule & Series Subscriptions

The Robert G. Alexander Webinar Series provides councils and their members with accessible, affordable, multi-disciplinary education. Programs are available live and on-demand to watch at your leisure and attendees can choose to register for individual programs or for a series subscription. Councils can also register for a group gathering, which provides one feed to be shown to a group gathered together in a single location. Registration fees follow:

Registration Fees	Individual	Series
Accredited Estate Planner® Designee	\$40	\$280
Junior / Student (Junior or Student member of an affiliated EPC or one who is in the process of attaining the AEP® designation by virtue of being enrolled in a required or elective course at The American College)	\$40	\$280
Member of Affiliated Estate Planning Council / At-Large Member of NAEPC	\$60	\$420
Non-Member	\$100	\$700
Group Gathering (one feed shown in a single location to a group, additional feeds available for \$25)	\$250	\$1,125

[HOT TOPIC] *2018 Schedule Released!*

For full program details, visit <http://www.naepc.org/events/webinar>. Councils are encouraged to contact our office to learn more about how councils are using the webinar series to provide their members with creative programming solutions.

Wednesday, January 10, 2018 · Lawrence P. Katzenstein, Atty, AEP® (Distinguished)

Wednesday, January 17, 2018 · Complimentary Sponsored Webinar: Longevity Changes Everything with Jon B. Mendelsohn, CEO and Co-Founder of Ashar Group and Ashar SMV

Wednesday, February 14, 2018 · Non-Tax Developments of Interest to Estate Planners: An Overview of Recent Cases of Significance for all Estate Planning Professionals with Jeffrey N. Pennell, JD

Wednesday, March 14, 2018 · High Tax Free Compounded Returns: The Keys to Building Wealth and Accomplishing Great Financial Planning with Jonathan G. Blattmachr, Esq., AEP® (Distinguished) and Jeff Glickman

Wednesday, April 25, 2018 · Complimentary Sponsored Webinar

Wednesday, May 9, 2018 · The Top 20 Insurance Planning Mistakes - How to Avoid or At Least Fix Them with Lawrence Brody, JD, LL.M., AEP® (Distinguished)

Wednesday, June 6, 2018 · Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change with Joshua S. Rubenstein, JD, AEP® (Distinguished)

Wednesday, July 18, 2018 · What the Estate Planner Needs to Know about Roth Retirement Plans with Natalie B. Choate, Esq., AEP® (Distinguished)

Wednesday, August 8, 2018 · Complimentary Sponsored Webinar

Wednesday, September 12, 2018 · Professional Collaboration with Heidi K. Gardner, PhD

Wednesday, October 10, 2018 · Blended Gifts for Boomers with A. Charles Schultz, JD

Wednesday, December 12, 2018 · Jeremiah W. Doyle, JD, LL.M. (taxation), LL.M. (banking law), AEP®
(Distinguished)

Continuing education credit is available at each NAEPC-hosted 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.

New Member Benefit!

[HOT TOPIC] LINK: Online Education brought to you by The Legacy Companies and sponsored by NAEPC

There are 2 circumstances when you work in collaboration: when you want to, and when you have to. Regardless of the reason, it can be challenging, frustrating and even professionally annoying. But when you have a process, and you use the 5 Best Practices of Collaboration, working with other professional advisors can be rewarding and productive. NAEPC commissioned The Legacy Companies to design, develop and deploy an interactive and self-paced 9-module online course at an incredibly low cost so that each of us can become experts at working in collaboration. To learn more, visit www.think-legacy.com/naepc.

The registration fee is just \$169 for members of affiliated local councils and \$100 for active Accredited Estate Planner® designees. AEP® designees should give the NAEPC office a call at (866) 226-2224 prior to enrolling to obtain a special discount code, council members can visit the website to get started today!



55th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION

November 6-9, 2018 · Ft. Lauderdale, Florida

The 55th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders is scheduled from November 6 – 9, 2018 in Ft. Lauderdale and it's never too early to plan to attend and to start sharing details about the conference with the members of your council.

Attendees will experience everything the NAEPC Advanced Estate Planning conference is known for – good company, great food and exceptional educational content – **[HOT TOPIC]** with exciting changes like an additional half day of educational content and a revamped approach to Council Leadership Day. Additional details will be released soon and registration opens April 2017!

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 or see a sample [HERE](#).**

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!**

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.)

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The Association of Choice for Estate Planning Professionals