

December 2018 Issue

## National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter for affiliated local council officers ·

This email is being sent to you as an officer or council executive for your NAEPC-affiliated local estate planning council, all officers on file with NAEPC receive the email.

Please share this publication with your entire board at its next meeting or forward it via email if a meeting is not scheduled soon.

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

### HIGHLIGHTS

- Message from Kit MacNee, Council Relations Committee Chairperson
- Using Webinars to Enhance Programming and Add Variety
- New Member Benefit

### IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference · November 5 - 8, 2019, Las Vegas
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



### Message from Kit MacNee, Council Relations Committee Chairperson



As our busy year draws to a close, I'd like to take a moment to thank your council for its continued membership in NAEPC. We are grateful for the membership of each of our 275 councils. **[HOT TOPIC]** The conclusion of 2018 brings with it a *record number of affiliates*, for which our board of directors, committee volunteers, and national office staff are extremely grateful. We hope that we have served your council well this year and look forward to that opportunity again in 2019.

Now is the perfect time to review all of the [benefits](#) provided to your local council and its members through affiliation with NAEPC! We are always happy to host a 30 minute benefit review call; simply [contact our national office](#) to schedule your time. Why not make maximizing the benefits of membership during 2019 a New Year's resolution for your council?

In closing, I would like to thank the entire [Council Relations Committee](#) for their service during 2018, especially committee co-chair Michael Panebianco. Our association would also like to officially welcome the eight new councils that joined or re-joined our ranks this year: Augusta EPC (GA); E&BPC of Hartford Connecticut (CT); EPC of Southern Minnesota (MN); Fox Valley EPC (WI); Gulf Coast EPC, Inc. (FL); Lincoln EPC (NE); Pioneer Valley EPC (MA); and Rochester EPC (MN). Together with your council and its members, we are one national network of estate planning professionals dedicated to excellence in estate planning.

### Using Webinars to Enhance Programming and Add Variety

The word "webinar" is a clever combination of web and seminar, an opportunity to bring education, national speakers, and/or specialized content to your council members without the expense of travel, lodging and

honorariums. The strongest councils employ clever programming combinations that meet the needs of all members, often including webinars! Councils have reported offering them as a regular part of their schedule, for special “meet up” brown bag events, and even as a free member benefit or special program for Accredited Estate Planner® designees. Contact the NAEPC office today to learn more about your options and how group webinars can enhance the activities of your Estate Planning Council.

**[HOT TOPIC]** > [See the 2019 Robert G. Alexander Webinar Schedule and learn more about series subscription options.](#) Don't forget that [all councils can receive one complimentary webinar each year!](#)

### **New Member Benefit**

NAEPC is happy to offer our members a 10% discount on several online learning programs provided by [The Legacy Companies, LLC](#). Legacy has helped accountants, attorneys, philanthropic advisors, financial advisors and many other advice-givers create powerful, lasting relationships for over 20 years.



#### **IGNITE Online Learning Program**

The fundamental success requirement of any advice-giver is your ability to generate powerful relationships in a short amount of time when you first connect with new opportunities. If that's not daunting enough, you have to do it in a business climate of skepticism, restrictive compliance, and high competition. That's why Legacy created the IGNITE program.



#### **LAUNCH Online Learning Program**

LAUNCH is designed with a single purpose: install a new process for engaging with future and current clients so that you can have the business, the clients and the kinds of engagements you want.



#### **ECHO Online Learning Program**

When families make decisions based on your recommendations, the results will echo long into the future. Their decisions become part of your legacy and theirs. Someone will serve your client for generations; we think it should be you. But one of the greatest risks to the advice-giving business model is a lack of generational reach. When your current clients die, and both the decisions and assets move to the next generation, those clients will leave you and move on to their own circle of advisor relationship. And it's worse. 70% of estate plans fail and cause the family to lose their wealth because of family cohesion challenges: they fight, and then go broke.



#### **LINK**

The LINK course will put the power of our 5 Best Practices of Collaboration in your hands, at your fingertips, so that you stay in the driver's seat, lead, and win the day for your client.

Be the next to have the clients, the business, and the life you want! To learn more about all of these courses and to enroll, visit the [online informational page](#) or the [NAEPC member benefit listing](#).



## 56<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders



Join us for NAEPCs return to Las Vegas!  
November 5 – 8, 2019

Plan now to attend and to share information with your council's members about the [Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Estate Planning Council Leaders](#). The conference program offers one day for leaders of estate planning councils (Council Leadership Day, Tuesday, November 5<sup>th</sup>) and two and one-half days of continuing education for every estate planner (Wednesday, November 6<sup>th</sup>, Thursday, November 7<sup>th</sup> & Friday, November 8<sup>th</sup>). The Annual Conference is open to all estate planning professionals, including every member of your EPC!

**[HOT TOPIC]** Reasons for your council to send an officer and the council's executive\* to Council Leadership Day:

- Participate in sessions that address the issues that are most important to your council
- Learn creative ideas for membership growth and retention, including how to find/engage younger members
- New programming ideas

Reasons for your members to attend:

- Two and one-half days of multi-disciplinary education offered by nationally-known presenters that complement a council's yearly calendar of events
- Up to 17 hours of continuing education credit
- Network with estate planners from around the country
- Competitive registration fee with most meals included and a reduced rate for EPC members

Visit [www.NAEPC.org/conference](http://www.NAEPC.org/conference) for more information or see the [highlights from the 55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference](#).

*\*Council executives attend the Tuesday and Wednesday sessions with the registration fee waived and participate in special executive-only events and meetings.*

### Robert G. Alexander Webinar Series ·

The Robert G. Alexander Webinar Series provides councils and their members with accessible and affordable multi-disciplinary education. Programs are available live and on-demand (to watch at a time that fits your schedule) 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.

### Next Regular Webinar

Wednesday, January 9, 2019 · 3:00pm - 4:00pm ET

Incorporating Long-Term Care, Longevity Annuities, and Investment Risk Into a Retirement Income Plan

Jamie P. Hopkins, JD, MBA, LLM, CFP®

Retirement income planning can be like trying to hit a moving target in the wind. Longevity risk, long-term care needs, and investment volatility all make income planning challenging. This intermediate

presentation will dive into best practices around building a retirement income plan that addresses these risks.

Jamie P. Hopkins is Director of Retirement Research at Carson Group and the co-creator of the Retirement Income Certified Professional (RICP) designation at The American College. He is also the author of *Rewirement: Rewiring The Way You Think About Retirement Planning*. Jamie is also a contributor to *Forbes*, *InvestmentNews*, and *Kiplinger* on retirement income planning.

[REGISTER HERE](#) for the individual program. To register for the 2019 webinar series, please click [HERE](#).

>See [all upcoming and previous webinars](#)

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

Continuing education credit is available at most NAEPC-hosted webinars 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.

#### 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 by your board! Please be sure to mention these valuable services at every council meeting, whether verbally or in print, and within postal 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](#).

- [NAEPC-Provided Benefits](#)
- [Educational Opportunities](#)
- [Marketing and Website Design Services](#)
- [Presentation Materials and Office Supplies](#)
- [Software](#)
- [Subscriptions and Publications](#)
- [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 ·**

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](#).

#### **Staying Connected Via LinkedIn ·**

*Does your council want to ask other councils for advice? Looking for ideas for programming?*

**[HOT TOPIC]** NAEPC maintains a group on LinkedIn just for council leaders. Join today to connect with council leaders from across the country and to initiate and participate in council management-specific dialogue! The 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.)



*NAEPC Minute* is an administrative report that does not take the place of *NAEPC News*, the official newsletter of the NAEPC, 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.

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*The Association of Choice for Estate Planning Professionals*