

The NAEPC Education Foundation

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ANNUAL REPORT

2013

*Working Through Estate Planning Councils to Help the Public
Understand the Multi-Disciplinary Approach to Estate Planning*

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Message from the President

Dear Friend of The NAEPC Education Foundation:

I am proud to report that 2013 was an active year for our organization! I hope you will review this report and come away with a better understanding of who we are, what we do, and how we met the mission of helping the public understand the need for estate planning by a multi-disciplinary team of individuals.



We took calendar year 2013 to regroup, refocus, and set the stage for new initiatives in 2014. Our new focus lies solely in helping the 250 estate planning councils affiliated with the National Association of Estate Planners & Councils produce public outreach events within their home communities. We believe this grass roots approach will yield the best result and reach the largest number of people, which will help spread our belief: **"You Need Estate Planning Too!"**

As you will see within this report, we operate the organization as effectively and efficiently as possible, and on a very slight budget. I would like to thank those estate planning councils and individuals who contributed more than \$19,000 to support our organization in 2013, more than a 20% increase in contributions from 2012!

Looking to 2014, you can expect to see our continued support of NAEPC-affiliated estate planning councils, more councils planning public events (and new types of events!), a newly-revised mission statement, and events hosted for the public by The NAEPC Education Foundation. I know you will be pleased to see our progress!

Thank you for your continued support of The NAEPC Education Foundation.

Sincerely,

A handwritten signature in black ink that reads "Joanna Averett". The signature is written in a cursive, flowing style.

Joanna Averett, MBA, CFP®, AIF®, AEP®
President
2014

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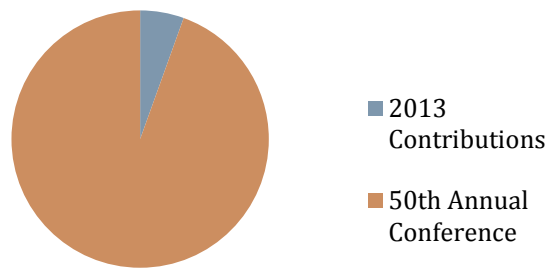
Financial Summary

The NAEPC Education Foundation, as a tax-exempt non-profit organization, annually files a Form 990 with the Internal Revenue Service to provide information to the public on the organization's finances, public support, and activities. As part of its commitment to transparency and accountability, The NAEPC Education Foundation makes available its most recent IRS Form 990; a copy of which can be obtained by contacting our office.

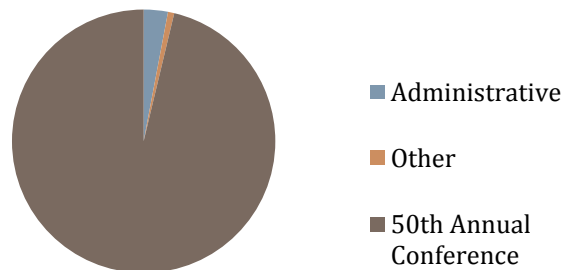
Tax ID Number

The NAEPC Education Foundation's tax identification number is 20-3467295.

Sources of Funds



Uses of Funds



Areas of Focus

The NAEPC Education Foundation Board of Directors spent the bulk of 2013 focusing on four distinct activities. A list of those focus areas can be found below, along with a brief explanation of each.

- **Furtherance** of National Estate Planning Awareness Week

National Estate Planning Awareness Week, our signature annual event, was established September 2008 by House Resolution 1499. During 2013, The NAEPC Education Foundation assisted the estate planning councils affiliated with NAEPC by:

- Offering a “Quick Start” program that provided sample letters and documents to reach out to the local members, non-profit organizations, and media with notice of this important event
- Providing a full kit of information for those councils that wish to host an Estate Planning Day within their home community
- Offering referrals and information to those councils who wish to plan other types of events during National Estate Planning Awareness Week

- Spreading **Knowledge** of The NAEPC Education Foundation to NAEPC-Affiliated Local Councils, their Members, and Accredited Estate Planner® Designees

A key element to the success of The NAEPC Education Foundation lies within the members of the National Association of Estate Planners & Councils. Our Board focused its efforts on making sure each and every member learned of the Foundation throughout the year, through mention in NAEPC newsletters and special mailings.

- Assisting NAEPC to Produce a **Fulfilling** 50th Annual Conference

Education is our core value. Co-hosting with the National Association of Estate Planners & Councils, the 50th Annual Conference was a success by every measurable statistic –record attendance, exceptionally high evaluations, and informative topics.

- Streamlining Internal **Structure** and Processes

Recognizing the need to revisit our bylaws, mission statement, and board structure, The NAEPC Education Foundation took several months late in the year to start discussions with regard to revisions of each of these important documents.

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