

The NAEPC

Education Foundation

**2014 ANNUAL REPORT**

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## *Our Mission*

- Educate the public regarding the benefits of the multi-disciplinary team concept of estate planning as espoused by the National Association of Estate Planners & Councils
- Provide information to the public on estate planning and financial literacy to improve their understanding of the process
- Encourage and support the development of nationwide educational conferences, seminars, forums, and meetings with regard to estate and financial planning for estate planning councils, professionals, related disciplines, and the public

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# MESSAGE FROM THE PRESIDENT



Gregory E. Sellers, CPA, AEP®

Dear Friend:

It is with much excitement that I assumed the “reigns” as president of The NAEPC Education Foundation on December 1, 2014. I speak for our entire board of directors when saying that we are looking forward to a year of growth and development during 2015.

In the interim, this annual report offers a full overview of the accomplishments of calendar year 2014 under the leadership of Joanna Averett, CFP®, AIF®, AEP®. Please, also, join me in thanking her for her exceptional service during her tenure as president.

The NAEPC Education Foundation operates with a dual mission of educating both the public on the need for estate planning and by offering estate planning practitioners the tools needed to work within a multi-disciplinary team to best serve the client, a mission taken very seriously by our board. Our programs are developed with this tandem focus in mind.

My hope is that, after reading this annual report, you will have a better understanding of The NAEPC Education Foundation and its mission, as well as how you can get more involved.

Best wishes,

A handwritten signature in black ink, appearing to read "Greg E. Sellers", with a long horizontal flourish extending to the right.

# ACCOMPLISHMENTS

## Educating Consumers

- Participation in National Estate Planning Awareness Week (HR 1499)
- Delivery of a consumer-friendly webinar, content remains available on [www.NAEPC.org](http://www.NAEPC.org)
- Re-launch of [EstatePlanningAnswers.org](http://EstatePlanningAnswers.org) with new & improved information

## Educating Professionals

- Produced a successful annual conference from November 5 – 7 in San Antonio, Texas where nationally-known speakers offered high-caliber technical education for all estate planning professionals with a special focus on the team concept of estate planning

## Working with Estate Planning Councils

- Maintained documents for estate planning councils to share information about National Estate Planning Awareness Week with their membership
- Coached local councils on hosting community outreach events

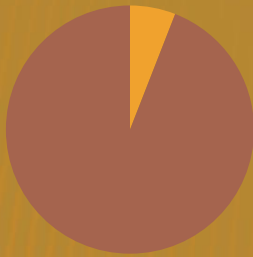


In honor of National Estate Planning Awareness Week 2014, the Estate Planning Council of Cleveland assembled over 20 volunteers to participate in a community service event with a local media affiliate. The local news outlet promoted the Council's presence in their studio and their ability to answer basic estate planning questions. Volunteers responded to calls from the public from 4:00 – 7:30 pm, during which nearly 100 questions about wills, trusts, social security, financial planning and other important topics were addressed.

# FINANCIAL SUMMARY

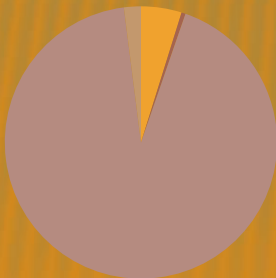
## Sources of Funds

- Contributions
- 52nd Annual Conference



## Uses of Funds

- Administrative
- Other
- 52nd Annual Conference
- Public Outreach



The NAEPCC Education Foundation, 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. The NAEPCC Education Foundation makes available its most recent IRS Form 990; a copy of which can be obtained by contacting our office.

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

# WITH APPRECIATION

We are most grateful for the support of the following organizations, individuals, and estate planning councils during 2014:

Greater Boca Raton Estate Planning Council  
Pinellas Estate Planning Council  
Pittsburgh Estate Planning Council  
San Antonio Estate Planners Council  
Southern Nevada Estate Planning Council

Estate of Harold Alan Schwartz, Jr.  
Morgan Stanley Foundation

Hartman Axley  
Robert A. Bacine  
John R. Becker  
Kathleen J. Belmonte  
William J. Braun  
Stephen P. Burk  
Julie A. Buschman  
Herbert Chasman  
Pandelis P. Chrysostomides  
Vincent M. D'Addona  
Walter Lee Davis, Jr.  
M. Eileen Dougherty  
Charles V. Douglas  
Gary L. Flotron  
Thomas M. Forrest  
John P. Garniewski, Jr.  
Pettus C. Gibbons  
L. Henry Gissel, Jr.  
Darlene D. Hagan  
Michael W. Halloran  
Donald R. Hehir, Jr.

Charles C. Ives  
Paul Katz  
William D. Kirchick  
Charles J. Labin  
Bobby L. Layman  
Mary Katherine Mac Nee  
Robert E. Maloney  
Clark B. McCleary  
David V. McCulloch  
P. Shaun McDuffee  
Richardson Bricken McKenzie, III  
Thomas V. Meaglia  
Loretta Nolan  
Jerry L. Picucci  
Fred W. Prella, Jr.  
John Wood Rittenhouse, Jr.  
Jordon N. Rosen  
Michael David Schulman  
John C. Scott, Jr.  
Gregory E. Sellers  
Laurie A. Siebert  
Michael J.A. Smith  
Joseph Sreshta  
Gregory D. Thomas  
Jeffrey M. Turner  
Paul S. Viren  
Byron E. Woodman, Jr.  
John R. Yaissle  
Gerald A. Youngs

# GETTING INVOLVED

The NAEPC Education Foundation welcomes your support, whether via a monetary contribution, submission for [www.EstatePlanningAnswers.org](http://www.EstatePlanningAnswers.org), or by encouraging your local estate planning council to host a community program. Contact our office today for more details.

# CONTACT

The NAEPC Education Foundation  
1120 Chester Ave., Ste. 470  
Cleveland, OH 44114  
866-226-2224  
<http://www.naepc.org/about/education-foundation>

**Key Contacts:**

2015 President, Gregory E. Sellers  
2015 Treasurer, John P. Garniewski, Jr.  
Eleanor M. Spuhler, Executive Manager