National Association of Estate Planners & Councils

2017 Committee Reports

The Association of Choice for Estate Planning Professionals

Distributed During Council Leadership Day

54th Annual NAEPC Advanced Estate Planning Strategies Conference

New Orleans, Louisiana

November 15, 2017

54th Annual NAEPC
Advanced Estate Planning Strategies Conference

President's Message
Paul S. Viren, CLU®, ChFC®, AEP®

Welcome to New Orleans! On behalf of the Board of Directors and dedicated staff of NAEPC,we greet you with open arms to the 54th Annual NAEPC Advanced Estate Planning Strategies Conference. These next few days will be filled with learning from the best estate planners in our various professions to help you keep current and advance your knowledge on a wide range of vital topics. **We are confident that you will find our time together valuable and helpful to you and your practice**.

In addition, the pre-conference Council Leadership Day sessions will be a terrific time to learn more about how NAEPC can assist councils and their leaders. It is our goal to support these local leaders in their efforts to create a council experience that is truly exceptional and successful. Learning and networking with each other is one of the best ways councils have grown by building on others success. At the heart of NAEPC's mission is to partner with you as a national organization to provide the tools, resources and these networking opportunities that will lead to your success as a council and as a practitioner. We are here to serve you and welcome your involvement and ongoing partnership.

This year has seen continued growth and success for NAEPC. Here are some highlights from 2017:

- We hosted the inaugural Regional Leadership Day programs where we come to communities around the country to offer the local council leaders a complimentary day of learning and sharing of ideas. We had over 200 attendees this year and next year plan to host three events, two in California and one in Washington State.
- Our website has been refreshed and a breeze to navigate. Please take a moment to tour www.NAEPC.org, we know you will like the new look and feel.
- In our ongoing efforts to enhance our learning and embracing the "multi-disciplinary teaming" concept we have partnered with Todd Fithian and the Legacy Companies and their new LINK program. This on-line, self-paced learning opportunity will help all of us to become better professionals and will be available to members very soon.

My theme during my time as the President of NAEPC is to celebrate your volunteerism. The precious gift of volunteer time to our profession is priceless. Please know that I am so thankful for each of the local council volunteers and their commitment to all of us. I have witnessed volunteers spend countless hours helping each other provide exceptional leadership and educational opportunities to your local council. I raise a toast to all the dedicated volunteers and say "thank you!" Speaking of volunteers, NAEPC is always looking for volunteers to serve on a variety of national committees and projects. If you have an interest you can find out more during the conference by asking the NAEPC staff or board members or turning to the last page of this informational packet.

Enjoy your time in the "Big Easy" and we look forward to getting to know you during our time together!

Warmest regards,

Paul S. Viren

54th Annual NAEPC
Advanced Estate Planning Strategies Conference

Volunteers by Committee

Following is a list of volunteers serving NAEPC, listed by committee, as of the date this packet was prepared*.

We are grateful for the support of so many talented and busy professionals each year. Should you wish to get more involved with NAEPC, please return the volunteer application found at the back of this packet to the conference registration desk prior to the conclusion of the program.

Accredited Estate Planner® Designation Committee

Julie A. Buschman, *Chair*
John T. Midgett, *Vice Chair*
S. Mark Alton
Hartman Axley
Kathleen J. Belmonte
Thomas M. Borchert
M. Eileen Dougherty
Robert E. Fox
John P. Garniewski, Jr.
Robert P. Goodman
David D. Green
Theodore L. Greenspan
Christopher P. Jakyma
Brian K. Kirby
William D. Kirchick
Daniel A. Rich
Lawrence A. Schwartz
John C. Scott, Jr.
Gregory E. Sellers
Susan J. Travis
Jeffrey M. Turner
Paul S. Viren
Eido M. Walny
Shane Westhoelter

Advanced Estate Planning Strategies Conference Committee

Julie A. Buschman, *Chair*
Lawrence J. Macklin, *Vice Chair*
S. Mark Alton
Kathleen J. Belmonte
Susan J. Burkenstock
Joseph V. Falanga
Michael W. Halloran
Mark H. Heller
Jeffrey Richard Hoenle
Lesley S. Hogan
Lawrence M. Lehmann
Jordon N. Rosen
Susan P. Rounds
Robert J. Ruelle
Charles Bennett Sachs
Geoffrey B. Sargeant
Judith A. Saxe
Robert C. Slane
Hal R. Terr
Paul S. Viren

Council Relations Committee

Mary Katherine Mac Nee, *Chair*
Michael P. Panebianco, *Vice Chair*
Hartman Axley
Paul L. Bechly
Lawrence K. Bogar
Richard G. Chalifoux
Joshua Didion
M. Eileen Dougherty
Sarah D. Duey
Daniel J. Flanagan
Robert E. Fox
Andrew T. Huber
Eric Charles Kordsmeier
Linda J. La Vay
Karen L. Lee Fatt
Lawrence J. Macklin
Laura J. Malone
John J. Meyer
Christine Anne Myers
Ken Nopar
Amy E. O'Bannon
James T. Peluso
Susan P. Rounds
Charles Bennett Sachs
Stephen F. Starzec
Brent A. Thomas
Paul S. Viren
Richard E. Wait
Eido M. Walny
Shane Westhoelter
Michael Wycklendt
Kim B. Young

Multi-disciplinary Teaming Committee

Charles V. Douglas, *Chair*	Lawrence M. Lehmann	Thomas C. Rogerson
S. Mark Alton	Mary Katherine Mac Nee	Judith A. Saxe
Hartman Axley	Laura J. Malone	John C. Scott, Jr.
Philip B. Cubeta	John T. Midgett	Martin M. Shenkman
Todd A. Fithian	Michael Rush Noland	Jeffrey M. Turner
Richard L. Harris	Tiffany A. O'Connell	Paul S. Viren
David W. Holaday	Huldah A. Robertson	John A. Warnick

Member Benefits Committee

Judith A. Saxe, *Chair*	Hal R. Terr
Julie A. Buschman	Paul S. Viren

Nominating Committee

Lawrence M. Lehmann, *Chair*	Clark B. McCleary	Carol E. Tully
M. Eileen Dougherty	Gregory E. Sellers	Paul S. Viren

Publications Committee

Susan P. Rounds, *Chair*	Joseph V. Falanga	Bruce Newburger
Brian M. Balduzzi	Sharon Goodman	Judith A. Saxe
M. Eileen Dougherty	Al W. King, III	Martin M. Shenkman
Charles V. Douglas	Bronwyn L. Martin	Paul S. Viren

Regional Leadership Day Task Force

Lawrence J. Macklin, *Chair*	Christopher P. Jakyma	Jordon N. Rosen
Richard G. Chalifoux	Lawrence M. Lehmann	Paul S. Viren

Webinar Committee

Thomas M. Borchert, *Chair*	Lawrence J. Macklin	Stephen M. Thaler
Charles V. Douglas	Michael Rush Noland	Paul S. Viren
Al W. King, III	Susan P. Rounds	

Website & Technology Committee

Robert P. Goodman, *Chair*	Dan H. Florence	Bruce Newburger
Christopher P. Jakyma, *Vice-Chair*	Jason E. Havens	John C. Scott, Jr.
S. Mark Alton	Howard J. Kass	Jeffrey M. Turner
Remy Carpenter	Michael R. Miranda	Paul S. Viren

**Report prepared September 30, 2017*

54th Annual NAEPC
Advanced Estate Planning Strategies Conference

Nominating Committee Report
Lawrence M. Lehmann, JD, CAP®, AEP®, ***Committee Chair***

Proposed Officers and Directors for Calendar Year 2018

Officers		Category	Home State
President	M. Eileen Dougherty	Trust Officer	Pennsylvania
President-Elect	S. Mark Alton	Financial Planning	New York
Treasurer	John P. Garniewski, Jr.	Accounting	Delaware
Secretary	William D. Kirchick	Attorney	Massachusetts
Past President	Paul S. Viren	Life Insurance	Washington

Directors	Category	Home State
Term Ending November 30, 2018		
Judith A. Saxe	Attorney	Massachusetts
Thomas M. Borchert	Life Insurance	Iowa
Charles V. Douglas	Financial Planning	Georgia
Robert P. Goodman	Accounting	Arizona
Julie A. Buschman	Trust Officer	Texas
Term Ending November 30, 2019		
John T. Midgett	Attorney	Virginia
Michael R. Noland	Life Insurance	Oklahoma
Hal R. Terr	Accounting	New Jersey
Lawrence J. Macklin	Trust Officer	Maryland
Ginger F. Mlakar	Philanthropy	Ohio
Term Ending November 30, 2020		
Susan P. Rounds	Attorney	California
Rick MacBarron	Life Insurance	California
Mary Katherine Mac Nee	Financial Planning	California
David D. Green	Accounting	Washington
Michael P. Panebianco	Trust Officer	New Hampshire

Director Emeritus	Home State
Hartman Axley	Colorado

Treasurer's Report

S. Mark Alton, CFP®, ChFC®, CLU®, CAP®, AEP®, MSFS, CPWA®, ***Treasurer***

I am pleased to offer this unaudited financial report of the National Association of Estate Planners & Councils.

This report is designed to give our member councils an overview of the financial health of our organization. Just like the local councils we serve, the national organization is dedicated to conservative stewardship of the member dues and fees we receive and services we provide.

The board of directors continues its work to build a reserve of one year of operating expenses, which will ensure that the organization is stable for many years to come.

As of the date of this report, September 30, 2016 we have a total balance sheet of $553,522 of which $117,952 is board designated to the AEP® committee for marketing and promotional purposes.

NAEPCs budgeted revenue for this calendar year by activity is as follows –

Income	
AEP® applications and dues	$285,775
Website Services	$205,100
Council Dues	$58,325
Individual Dues	$8,400
Leimberg Subscription Services	$72,000
Webinar Income	$19,825
Other Income	$33,000
Annual Conference Income	$443,050
Total Income	**$1,125,475**
Total Expense	**$1,118,615**
Budgeted Income	**$6,860**

As of the date of this report we are ahead of budget and on track for a successful year in all areas of the association!

Accredited Estate Planner® Designation Committee Report

Julie A. Buschman, CPA, AEP®, CAP®, ***Committee Chair***
John T. Midgett, JD, AEP®, ***Committee Vice-Chair***

The mission of the NAEPC and the AEP® designation program is to promote excellence, professionalism, and the team concept of estate planning among credentialed professionals. To this end, the AEP® Committee devotes their time to issues specific to governance, support, and promotion of the AEP® designation program. During 2017, the committee activities included:

- A continuation of the partnership with Broadridge/Forefield to provide the Continuing Education, Advisor, and Newsletter components of their suite of services at no cost through August 31, 2017. As of September 1, 2017, all designees have access to a 35% discount and expanded components of their service at that discount.

- Support of the AEP® Council Nomination program and recognition of creative initiatives sponsored by local councils to introduce qualified members to the AEP® designation program - this includes the “Social in a Box” stipend that assists local councils in sparking interest in the AEP® designation program within their home community.

- An ongoing commitment to furthering recognition of the AEP® designation in the private and public sector.

- A permanent sub-committee continues to review the qualifications and requirements for the AEP® designation program, including the review of possible alternative graduate coursework for interested applicants with less than 15 years of experience, as well as review of other potential qualifying “gateway” credentials. Since the last annual meeting, we now recognize philanthropic advisors and have added the following gateway credentials: Chartered Advisor in Philanthropy® (CAP®)*, Certified Specialist in Planned Giving (CSPG), Certified Private Wealth Advisor® (CPWA®), Chartered Financial Analyst (CFA), and Master of Science in Taxation (MST).** We warmly welcome qualified professionals holding these designations to now pursue the attainment of the designation.

- Support of a newly-expanded editorial board for “The Technical Corner” in the AEP® ALERT – please consider submitting an article for publication!

- Speaker selection for the seventh annual exclusive AEP® and EPLS Designee Session: Legacy Planning Reimagined: a Discussion with Philip B. Cubeta, CLU®, ChFC®, MSFS, CAP®, AEP®.

- Responsibility for selection and nomination of the 2018 class of inductees into the NAEPC Estate Planning Hall of Fame®, created to recognize significant and outstanding lifetime achievement and contributions to the profession of estate planning within the disciplines of accounting, insurance and financial planning, legal, trust services, and academia. We are pleased to report that the following individuals are being inducted on Friday, November 17, 2017.

Vincent M. D'Addona, CLU®, ChFC®, RICP®, RFC, CExP™, MSFS, AEP® (Distinguished)
Donald O. Jansen, JD, LL.M., AEP® (Distinguished)
R. Hugh Magill, JD, AEP® (Distinguished)
Edward Mendlowitz, CPA, AEP® (Distinguished)
Joshua S. Rubenstein, JD, AEP® (Distinguished)
John J. Scroggin, JD, LL.M. (taxation), AEP® (Distinguished)

Please join us in congratulating these outstanding individuals on their achievement.

*Applicants must take the Advanced Estate Planning Course (GS815) through The American College.
**Special requirements must be met and approved by the national office before applying.

54th Annual NAEPC
Advanced Estate Planning Strategies Conference

Conference Committee Report

Julie A. Buschman, CPA, AEP®, CAP®, ***Committee Chair***

Lawrence J. Macklin, Esq., CPA, AEP®, ***Committee Vice-Chair***

Welcome to New Orleans and the 54th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders. We are delighted to be at the historical The Roosevelt New Orleans, Waldorf Astoria Hotel. This unique hotel was officially named in 1923 in honor of President Theodore Roosevelt, whose efforts building the Panama Canal had financially benefited the city. After many years, owners, and name changes, the new owners in 2009 reopened the restored hotel and reclaimed the Roosevelt name with a look of the original grand days of the 1930s and 1940s.

This annual conference provides an opportunity to network with professionals from around the country in a uniquely intimate setting. You will share with, and learn from, leading experts in the areas of law, accounting, insurance, financial planning, trust services, and philanthropy. Our conference has become well known for the quality of its multi-disciplinary programs, and our speakers are among the best and brightest in the business. You will hear about cutting edge tools and techniques, creative strategies and solutions, as well as industry trends and developments.

For those for whom it is appropriate, we are hopeful you will attend Council Leadership Day where you will have an opportunity to share best practices with other council leaders, in both your own region and by council size. Additionally, we are excited to welcome Sharna Goldseker, Executive Director with 21/64, who will lead an interactive discussion on communication across generations with a focus on philanthropy. Fun tools will be provided for all attendees to take back to utilize at their own family meetings. Most of you will stay with us and will enjoy two full days of continuing education, and receive up to 15 hours of CE* for doing so. All conference attendees are invited to join us at the Welcome Reception on Wednesday evening, November 16th, in the Exhibit Hall.

We also encourage all active AEP® designees to attend a private session to be held on Thursday, November 16th at 5:15 pm where Philip B. Cubeta, CLU®, ChFC®, MSFS, CAP®, AEP® will lead a collaborative discussion on how we can have deeper meaningful conversations with our clients to truly uncover their legacy goals.

For those of you who have not yet pursued the AEP® designation, we will host a concurrent informational session: "The Accredited Estate Planner® Designation Program from A-Z." This program is offered for those who are interested in learning more about the AEP® designation. This session will provide an overview of the program and offer an opportunity to have your questions answered by the experts at NAEPC. Please reference your conference "pocket guide" for information about the location and timing of these events, and all events and meeting locations throughout the conference.

Our surveys confirm the value the conference provides, and the benefits that accrue to all attendees. Please help us spread the word, and grow our conference. As always, we are most interested in hearing from you. Many of our best ideas come from attendees and participants so please provide your feedback within a survey that will arrive in your email inbox on Friday, November 17th.

Looking forward to next year, we are very excited to take our program to Ft. Lauderdale where we'll be adding an additional half-day of education to the event! Watch your email for more information on these exciting changes.

*Individual states and/or governing bodies determine the total number of credit hours awarded. Visit www.NAEPC.org/conference for more information.

Council Relations Committee Report

Kit Mac Nee, CFR®, CRPC®, CSPG® AEP®, ***Committee Chair***
Michael P. Panebianco, JD, LL.M. (taxation), AEP®, ***Committee Vice-Chair***

It is the mission of the CRC to deliver the exceptional resources, unsurpassed education and best practices referenced prominently within the association's mission statement to the affiliated councils, as well as to work to assist those councils interested in membership in NAEPC through the affiliation process.

What a year it has been for NAEPCs Council Relations Committee! Seven new councils joined our ranks so far during 2017, they are:

Berkshire County Estate Planning Council, Inc.
East Valley Estate Planning Council
Estate Planning Council of Grand Traverse Area
Greene County Estate Planning Council
Santa Fe Estate Planning Council
Wake County Estate Planning Council
Washtenaw Estate Planning Council

For those who are counting, that makes nearly 275 councils affiliated with NAEPC – a growth of over 40 councils in less than 5 years! Paul S. Viren, CLU®, ChFC®, AEP®, the association's 2017 president, was instrumental in assisting our committee members in reaching out to councils across the country with regard to membership. We express our thanks to Paul and all the committee members who helped guide these councils to affiliate with NAEPC.

Perhaps one of the most exciting initiatives at NAEPC during 2017 was the addition of three **Regional Leadership Day** programs on the East coast during April (Wilmington, DE / Columbus, OH / Orlando, FL). These intimate events mimic the activities of the Council Leadership Day held each year at our annual conference and were incredibly valuable. To learn more about what was discussed at each 2016 event, please visit http://www.naepc.org/conference/leadership-day. We'll be repeating the experience in 2018 so please keep an eye out for information on the events in California and Washington State in June 2018! We express our personal thanks to Lawrence J. Macklin, Esq., CPA, AEP® and his sub-committee for making these new events a reality.

The Council Relations Committee thanks the over 25 councils that submitted applications for the 2017 Walter Lee Davis, Jr. & Leonard H. Neiman Council of Excellence Award. The sub-committee, chaired by Michael Panebianco, is so excited to recognize all of our honorees for 2017. We are grateful to the sub-committee for their time in reviewing all of the applications this summer. It is amazing to see both returning and new winners. As a reminder, the application is a guide to the best practices with only five subjective points. Completion is simple - checking the boxes, sending a few documents, and adding valuable commentary. Please consider submitting an application for 2018. You can read more about the Council of Excellence honorees within the report that follows.

For the bulk of the year the Council Relations Committee discussed reorganizing its territories, clarifying our committee's mission and job descriptions, and then training volunteers. We are so appreciative for the patience and understanding of all of the committee members during this time. We are still looking for volunteers to take on a territory of 4-7 councils in several geographic regions of the country so don't be shy! A committee volunteer application can be found at the very end of this packet. Service on this committee involves monthly meetings, promotion of Council of Excellence and Regional Leadership Day programs, and Annual NAEPC Advanced Estate Planning Strategies Conference attendance by both council leaders and members, encouragement of the usage of the "no charge" and online speaker libraries, Robert G. Alexander Webinar Series and member benefit program. The committee will also engage councils with NAEPC by remaining in frequent contact with its leadership. The committee, Michael and I encourage you to join us in serving all of our councils.

54th Annual NAEPC
Advanced Estate Planning Strategies Conference

Walter Lee Davis, Jr. & Leonard H. Neiman Council of Excellence Award Report
Michael P. Panebianco, JD, LL.M. (tax), AEP®, ***Sub-Committee Chair***

I would like to thank Kit MacNee, M. Eileen Dougherty, Lawrence K. Bogar, Eric Charles Kordsmeier, John J. Meyer, and Stephen F. Starzec, for their time, assistance, support, and experience in reviewing this year's applications and everything else they've done in being a part of this sub-committee of the Council Relations Committee.

We thank all the councils that submitted applications for the 2017 Walter Lee Davis, Jr. & Leonard H. Neiman Council of Excellence Award ("Council of Excellence Award") and are thrilled to recognize this year's winners:

2017 Council of Excellence Recipients

Extra Small/Small:	EPC of San Bernardino (CA)
Medium Co-Recipients:	Greater New Jersey EPC (NJ) and Spokane EPC (WA)
Large Co-Recipients:	Baltimore EPC (MD) and EPC of New York City (NY)
Extra Large Co-Recipients:	Boston EPC (MA) and EPC of Cleveland (OH) and Philadelphia EPC (PA)

2017 5-Star Award Winners

Extra Small/Small:	EPC of Bergen County (NJ) and Northwest Washington EPC (WA)
Medium:	EPC of Central Arizona (AZ) and EPC of Eastern New York (NY) and New Orleans EPC (LA)

They will be officially recognized at the 54th Annual NAEPC Advanced Estate Planning Strategies Conference during Council Leadership Day.

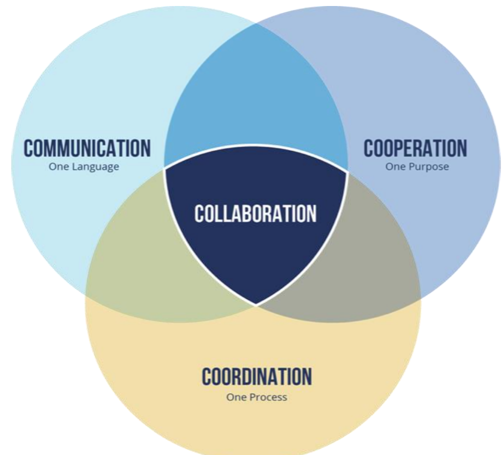
The councils recognized this year have all demonstrated that they excel in the various attributes that drive council success. These attributes, which are the focus of the Council of Excellence Award, include: 1) Leadership and Council Management, (2) Membership Growth and Retention, (3) Programming and Events, (4) Communications, (5) Financial Health, (6) Public Outreach, and (7) Maximizing their Relationship with NAEPC and the programs and services NAEPC provides to councils and their membership.

In particular, the councils being recognized this year generally scored higher than others in three areas which put them over the top: Membership Growth and Retention, Public Outreach, and their Relationship with NAEPC. The committee has seen marked improvement in many councils that have applied for the Council of Excellence Award more than once and fully expect to see these councils achieve 5 Star status and winning within their size category in the future as they continue to build on their success. Of course, the committee believes that council improvement is its own reward!

Finally, in reviewing the applications, the committee gets to see great things happening out there, like the Howard County Estate Planning Council (MD) which was formed in 2014 by 11 people and now has more than 80 members, and numerous councils that have experienced similar growth and others that have sponsored or co-sponsored terrific programs for their members and the public at large. We encourage council leaders to get the most out of their time sharing with and learning from their fellow leaders during the breakout sessions on Council Leadership Day.

Multi-Disciplinary Teaming Committee Report

Charles V. Douglas, JD, CFP®, CAP®, AEP®, ***Committee Chair***



Estate planning is a team sport. Meeting the challenges of mutually partnering with peers and offering a more integrated wealth management experience for the client over the long term is a lofty goal for any individual or group of advisors to meet. More and more, advisors are looking for a better process to accomplish this tall task and they are increasingly turning to the National Association of Estate Planners & Councils (NAEPC) and Accredited Estate Planner® (AEP®) designees for help. Advisors are realizing, with some urgency, that the future success of their business lies in embracing a collaborative team-based approach of multi-disciplinary professionals, and that the time to position their practice is today.

During this past year we have significantly upgraded our various tools and resources for your reference and they can be found at www.naepc.org under the "Guide to Teaming" tab. Also, we have taken a huge step forward towards offering a more formalized, collaborative training course, by engaging the services of The Legacy Companies, LLC in building a project known as LINK. LINK, a first of its kind, will be an online collaborative training course offered to AEP® designees, affiliated councils, and their members. LINK's purpose is to help estate planning advisors successfully build, work and operate as part of a highly functional and collaborative estate planning team.

Ultimately, the success of NAEPC's long-term commitment of promoting the multi-disciplinary team approach to estate planning rests with its affiliated local councils and their members. Please familiarize yourself with our varied collaborative resources, including LINK, so that you can share these important tools with your local councils and their members.

Whether the death tax is repealed in coming months, there are, nevertheless, consequential changes afoot in our industry. Our world and workplace are increasingly becoming interdependent. And, those advisors who cling too tightly to an independent estate planning approach run the risk of being left behind. Please help NAEPC spread the collaborative word of the many benefits to be gained through multi-disciplinary teaming. Please also consider sharing your experiences with our committee so that we can share your feedback and best practices with our full membership.

54th Annual NAEPC Advanced Estate Planning Strategies Conference

Member Benefits Committee Report
Judith A. Saxe, JD, AEP®, ***Committee Chair***

The member benefits committee reviews and approves potential new offerings for our member councils and their members. These "value partners" include services and products at a discounted price in several categories. We also continue to expand participation in the online speaker library for the benefit of local councils that seek to fill a program in their annual schedule. Please be sure to visit the member benefits and the online speaker library sections of website.

All value partners receive special recognition at our annual conference by recognition within the exhibit hall. You will also be able to identify these individuals by the special ribbons attached to their name badges. Please take a moment to visit their booths during your time at the 54th Annual NAEPC Advanced Estate Planning Strategies Conference.

Our committee meets regularly to review applications received for the value partner program and for the speaker library, to consider additional types of benefits that may be most helpful to councils and members, and to improve communication of the benefits to the councils and members. Applications to become a value partner are located on our website. In addition to several time-specific conferences and events, the following benefit applications were reviewed and accepted since December 1, 2016:

AdvisorAdit LLC (benefit for councils)
DIGITAL CONFERENCE BOOK - COURSE SURVEYS - ATTENDANCE TRACKING
The AdvisorAdit suite of mobile event services is a cost-effective way to modernize your attendee experience and was recommended to NAEPC by an EPC administrator.

M Brands Film Inc. (M) (benefit for councils and members)
Through a value partner arrangement with NAEPC, M is offering video production services to affiliated local estate planning councils and members of councils at a reduced fee.

Wilson and Bow
Custom neckwear (neckties, bow ties, and scarves), socks, and blankets
Speaker gifts, client gifts, or just something fun, Wilson and Bow customizes neckwear and socks to include your logo

This dynamic and valuable list of value partners is available in one of two places for council members. First, for those councils that have an advanced website hosted through NAEPC, the list can be found on the local council's website. For those councils that do not have a website through NAEPC, the list should be accessed from www.NAEPC.org. All members must utilize a user name/password to access a limited number of password-protected ordering links and information. If your council has a website hosted through NAEPC and utilizes passwords, its members can use their local user name and password. 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.

Our committee is also responsible for reviewing applications from individuals who wish to be included in the NAEPC online Speaker Library and is excited to have welcomed Chris Wills of College Inside Track during 2017.

We appreciate referrals from all of members for opportunities to add to our value partners and speakers. Please contact NAEPC if you have any recommendations.

54th Annual NAEPC
Advanced Estate Planning Strategies Conference

Publications Committee Report
Susan P. Rounds JD, CPA, LL.M., AEP®, TEP ***Committee Chair***

NAEPC Journal of Estate and Tax Planning Mission:
"To maintain a best-in-class library of thought leadership relevant to the Estate Planning Community."

New Members
The Publications Committee welcomed two new members this year, each with writing and editorial experience: Bronwyn X. Martin of Ameriprise Financial Services, Inc. and Brian Balduzzi, Esq. who is currently enrolled as a student in the MBA program at Cornell. We are delighted to have this new talent!

Key Metrics
We are currently on track to host over 90,000 sessions, up from 75,000 last year. Page views from the last Issue approached 70,000, up from a previous high of nearly 30,000.

Original Articles
We continue to publish original articles written especially for *The NAEPC Journal* of Estate & Tax Planning and to receive corresponding reprint permission requests. The most recent came for the following from a speaker preparing for a presentation at the upcoming Pennsylvania Bar Institute:

<u>The Future of Estate Planning: Focus on The Legal Practitioner</u>
Authors: Kelly Dancy, Esq., and Eido Walny, JD, AEP®, EPLS

News Nook

Our "News Nook" is well in place with a new addition, "Tax Topics" authored by Blanche Lark Christerson of Deutsche Bank. This rounds out our stable of regulors listed below:

<u>The NAEPC Journal of Estate & Tax Planning Quarterly Tax Update</u>
Author: Scott E. Swartz, JD, LL.M., AEP®

<u>Practical Planner Newsletter</u>
Author: Martin M. Shenkman, CPA, PFS, MBA, JD, AEP® (Distinguished)

<u>NAEPC Monthly Technical Newsletter</u>
Reproduced courtesy of Leimberg Information Services, Inc. (LISI)

54th Annual NAEPC
Advanced Estate Planning Strategies Conference

Accredited Estate Planner® Designee – Recent Top Picks
The "Accredited Estate Planner® Designee - Top Pick" signifies the most popular article from each issue in terms of views by AEP® designees.

2017 Heckerling Institute of Estate Planning Highlights
Marty's amazing PowerPoint hits the high points of Planning in Light of Repeal and Recent Developments
Reproduced courtesy of Heckerling Institute and the University of Miami, and Leimberg Information Services, Inc. (LISI)
Author: Martin M. Shenkman, CPA, MBA, PFS, AEP® (Distinguished), JD

Estate Planning Traps That Have Nothing To Do With Estate Taxes
A NAEPC Journal original! At a time when some clients may be wondering why they should proceed with estate planning due to the proposed elimination of the estate tax, this article reminds us that there are many issues to resolve aside from taxes and provides wise counsel on how to proceed.
Authors: Stuart M. Horwitz, JD, LLM (Taxation) and
Jason S. Damicone, JD, LLM (Taxation)

The Anatomy of the Perfect Modern Trust - Part 1
The authors identify and examine methods to accomplish the 6 factors on the client "wish list": Control; Use/Enjoyment; Flexibility; Creditor Protection; Tax Savings; and, Simplicity.
Reproduced courtesy of Thomson Reuters' Estate Planning
Authors: Richard Oshins, JD, LL.M., MBA, AEP® (Distinguished) and
Steven G. Siegel, LL.M.

Another Great Year!
A special thank you to all board members who share articles of interest with us, to the Publications Committee members for their time and innovative thinking, to our webmaster, Bruce Newburger, for his invaluable experience and guidance, and to Eleanor M. Spuhler for her patience, support and the unwithering smile in her voice, hurricanes notwithstanding.

Webinar Committee Report

Thomas M. Borchert, CLU®, ChFC®, AEP®, CLTC, MA, LUTCF, ***Committee Chair***
Lawrence J. Macklin, Esq., CPA, AEP®, **C*ommittee Vice-Chair***

The NAEPC Webinar Committee has completed four years of monthly webinars; bringing to our member councils and their members "the best of the best, of the best" in speakers and topics, as prescribed by its originator, Robert (Bobby) Alexander. The committee members, listed at the beginning of this packet, have done an excellent job. Our attendance grew by 65% in the second year and by 112% in third year, and has now leveled off back at the second year level with an uptick in the use of group gatherings. We therefore, continue to look for ways to increase attendance and subscribership. It is hoped that the committee will be given a budget of sufficient size to allow us to develop effective strategies with the assistance of a marketing professional.

The list of outstanding estate planning professionals who have volunteered their time and expertise is remarkable. They have created one of the finest archives of professional estate planning content available anywhere. We thank all of you, especially our speaker volunteers, for your interest, involvement and support.

The one-hour webinar programs are typically offered monthly on the 2nd Wednesday at 3:00 ET, excepting the November conference month. Nearly all webinars are archived for playback at the listener's convenience. They have become a favorite for many councils, as a group learning/discussion activity and often as the monthly program allowing the members to hear from experts who are otherwise difficult or impossible to schedule for a local event. It is possible to arrange satellite locations to facilitate such local presentations.

Continuing education credit may best be made available by local councils arranging for credit in a group setting in advance within their home State. Of course, continuing education credit toward the AEP® designation requirement is available at each webinar for Accredited Estate Planner® designees. In addition, a certificate of completion is made available for those professionals who feel the program satisfies their continuing education requirements and are able to self-file.

The registration fee is only $40 for Accredited Estate Planner® designees whose dues are current, $60 for members of an affiliated local estate planning council or at-large members of NAEPC, $100 for individual non-members, and $250 for a council meeting or group gathering for councils whose annual dues are current.

Discount Subscriptions
In 2016, 2017, and again in 2018, discounts will be available to individuals and councils preferring to make a single payment for the entire year of webinars which can be viewed at the subscriber's convenience throughout the year. Savings are significant! You can subscribe for the season online at www.naepc.org/products/product/1.

Final 2017 Program
Our final webinar for 2017 will be on Wednesday, December 13, 2017 from 3:00 – 4:00 pm ET with Steven J. Oshins, JD, AEP® (Distinguished) speaking on "***A December Guide to the Trump Tax Act: Where We Stand and New Planning Opportunities."***

54th Annual NAEPC
Advanced Estate Planning Strategies Conference

2018 Schedule
Please consider joining us for a program (or all of them) during 2018. Our schedule is:

January 2018 - date TBD	Sponsored complimentary webinar provided by Ashar Group
January 10, 2018	Lawrence P. Katzenstein, Atty, AEP® (Distinguished)
February 14, 2018	Jeffrey N. Pennell
March 14, 2018	Jonathan G. Blattmachr, Esq., AEP® (Distinguished)
April 25, 2018	open for a hot topic!
May 9, 2018	Lawrence Brody, JD, LL.M., AEP® (Distinguished)
June 6, 2018	Joshua S. Rubenstein, JD, AEP® (Distinguished)
July 18, 2018	Natalie B. Choate, Esq., AEP® (Distinguished)
August 8, 2018	open for a hot topic!
September 12, 2018	Heidi Gardner
October 10, 2018	A. Charles Schultz, JD
December 12, 2018	Jeremiah W. Doyle, IV, JD, LL.M. (taxation), LL.M. (banking law), AEP® (Distinguished)

**speakers, dates and times subject to change*

Website & Technology Committee Report

Robert P. Goodman, CPA, AEP®, CFP®, ***Committee Chair***

Thank you to our affiliated councils and particularly those that subscribe to our website services for another fabulous year!

The Website & Technology Committee is a committed and hard working group of individuals that come together to serve you in the best manner possible and allows NAEPC to establish a central point of communicating with you, the national association, the public and other interested parties. Our bonds continue to grow through collaboration.

We continue to hit new highs in the number of council subscribers, both large and small, and more councils continue to see the benefit of moving to our more sophisticated level III and IV platforms.

You, the affiliated councils, are the primary source for new features and enhancements to our program. We continue to move toward the website being the centralized administrative hub for local councils and roll out features that enhance efficiency at the administrative level. The value of the website service continues to not only be competitive in the marketplace, but an overwhelming favorite in terms of value and ease of use. We also continue to prioritize security in all that we do.

Here is a sample of new features that we've rolled out during 2017:

- New Renewal Management Functions for Members and Admins
- New Security Measures to Better Protect Your Member's Email Addresses
- Interactive Membership Application is Revamped with Customized Questions
- PCI Compliance Monitored and Changes Implemented
- Councils Site Migrated to a New Upgraded Server

In 2018 we are working to finalize an incredibly robust development agenda that focuses on security, member data, and AEP® services.

I'm extremely grateful for our webmaster, Bruce Newburger, and I hope you take some time to meet with him while you are here for Council Leadership Day. Also please thank the entire committee as you see them throughout the conference; the list of all members can be found at the beginning of this packet.

For more information about council website options, please visit http://www.naepc.org/affiliated-councils/website-packages.

National Association of Estate Planners & Councils
1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

National Association of Estate Planners & Councils
Committee Volunteer Application

NAME____

Primary Professional Discipline: ___Attorney ___Accountant (CPA) ___Financial Planner (CFP® / ChFC®)

___Life Insurance Professional (CLU®) ___Trust Officer

Designation(s) held ___AEP® _____EPLS ___ CFP® ___ChFC® ___ CLU® ___CPA ___JD ___ CTFA

Please List Other Designation and/or Degrees ____

FIRM/COMPANY____

ADDRESS____

____

TELEPHONE (Business)________________________(Cellular)________________________________

Email__________________________________

I am a member of the ____Estate Planning Council.

I am current on all continuing education requirements required by all degrees/designations held ___Yes ___No

List Professional/Trade Organizations to Which You Now Belong in Addition to NAEPC:

____

____

Committee Interest (check all that apply)

_____Accredited Estate Planner® Designation *(*meets monthly on the 4th Monday at 2:00 pm ET)
Responsibilities: designation program maintenance & growth, must be a current designee

_____Annual Conference (meets monthly on the 4th Monday at 11:00 am ET)
Responsibilities: program development, fundraising for upcoming annual conference & general event policy

_____Council Relations (meets monthly on the 4th Thursday at 11:00 am ET for approximately 30 minutes)
Responsibilities: affiliated local council retention & growth within territory structure, promotion of benefits, programs & services for council consumption

_____ Member Benefits (meets monthly on the 4th Monday at 4:00 pm ET for approximately 30 minutes)
Responsibilities: review and refer member benefit applications, online speaker's bureau review

_____ Multi-Disciplinary Teaming (meets monthly on the 2nd Thursday at 2:00 pm ET)
Responsibilities: oversight of projects & materials related to the team concept of estate planning

_____ Publications (meets quarterly, schedule for 2017 to be determined)
Responsibilities: oversight of the NAEPC Journal of Estate & Tax Planning

_____Robert G. Alexander Webinar Series (meets every other month on the 4th Thursday at 2:30 pm ET)
Responsibilities: programming and oversight for webinar series

_____Website & Technology (meets monthly on the 3rd Tuesday at 10:30 am ET)
Responsibilities: development of affiliated local website platform, www.naepc.org, oversight of association's social media strategy, and varied committee requests

**committee placement subject to availability and chair approval – meeting dates and times subject to change*