

**LEIMBERG INFORMATION SERVICES, INC. (LISI)**

*Fast, Frank, Incisive Analysis*



**LEIMBERG ACCESS FOR COUNCILS**



By taking advantage of the NAEPC Leimberg Information Services (LISI) member benefit program, your council members will have on-demand access, through a dedicated Estate Planning Council portal, to Leimberg Information Services' huge database of proposed and recent legislation, regulations, cases, rulings, and much more.

LISI provides financial service professionals fast, frank and incisive analysis of proposed and recent legislation, regulations, cases, and rulings - and access to those posted throughout the year. These commentaries are instantly accessible through LISI's incredibly powerful search engine that will allow members to create customized searches to locate specific topics, references, and citations of particular interest to them faster and more efficiently than ever before.

Members will receive weekly email updates from LISIUpdate@naepc.org that include LISI highlights from the previous week. In addition, NAEPC sends a monthly tip or tool to the council's contact to assist in maximizing the subscription's value to your members. Our goal is to support your efforts in reminding your members they have a powerful search engine available at their fingertips, and how to access it. Council tools include PowerPoint presentations to share at meetings, handouts to distribute, brochures, and email text to include in your communications.

▪ **Cost to NAEPC affiliated councils** ▪

- To enroll in Jan., Feb., March, or April      \$24/member
  - To enroll in May, June, July, or Aug.      \$20/member
  - To enroll in Sept., Oct., Nov., or Dec.      \$30/member \*
- \*covers the last 4 months of the year and all of the following year.

***ALL members of a council must be enrolled.***

A list of members' email addresses must be submitted electronically in Excel to:  
[LISIUpdate@naepc.org](mailto:LISIUpdate@naepc.org) using the following format: First Name, Last Name, Email Address.

# LEIMBERG REGISTRATION FORM

Council Name: \_\_\_\_\_

Number of Current Council Members: \_\_\_\_\_

Please designate a Leimberg Contact to be the council's connection for all LISI information.

**Contact Information for Council's designated Leimberg (LISI) contact**

Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Dues Worksheet:**

Enroll in Jan – April: \$24 x # of council members (\*total active membership) = total due

Enroll in May – Aug: \$20 x # of council members (\*total active membership) = total due

Enroll in Sept – Dec: \$30 (includes the following year) x # of council members (\*total active membership) = total due

\* **This is not negotiable.** Members *may* be contacted by Leimberg Information Services directly during their enrollment and/or after termination of the council subscription.

**TOTAL DUE:**    \$ \_\_\_\_\_

Charge my credit card \$ \_\_\_\_\_     MasterCard     Visa     American Express

Card Number: \_\_\_\_\_ Exp Date: \_\_\_\_\_

Signature: \_\_\_\_\_

- or - **Make check payable to: NAEPC**

**Mail to: NAEPC • 1120 Chester Avenue, Suite 470 • Cleveland, OH 44114**

**Fax: 216-696-2582**

Please submit this form, your payment, and an Excel spreadsheet containing your current active membership with the following fields:

**First Name**    |    **Last Name**    |    **Email Address**

Please send this roster to: [LISUpdate@naepc.org](mailto:LISUpdate@naepc.org)

**NOTE: Enrollment cannot be processed until the spreadsheet has been received.**

After this form, payment and the database have been received and processed NAEPC will send you and your membership directions on how to access the Leimberg Information Services (LISI) website and set up usernames and passwords.