

LEADERS in
the **ESTATE**
PLANNING
COMMUNITY.

2024
COUNCIL OF EXCELLENCE
AWARD INFORMATION

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Introduction

The National Association of Estate Planners & Councils Council of Excellence Award recognizes councils affiliated with the NAEPC that are positioned toward success. We look forward to receiving your application on or before **May 17, 2024**. Should you have questions during the process, please contact us at admin@naepc.org or 866-226-2224.



The Council of Excellence Award is named for two individuals who sought to strengthen the bond between NAEPC and its affiliated councils during their terms on the board. Walter Lee Davis, Jr. served as president of the association in 2008 and was instrumental in forming the [Council Relations Committee](#), a group of volunteer members charged with being a liaison between affiliates and the national association. Leonard H. Neiman served the association as a board member for over fifteen years. He worked tirelessly to organize information about affiliated and unaffiliated councils around the country, and to contact their leadership to explain the benefit of membership.

Awards are offered within the following council sizes:

Extra Small/Small (1-100 members)
Medium (101 - 250 members)

Large (251 - 400 members)
Extra Large (401 members or more)

Each application will be assessed in the following areas: Membership, Programming & Communication; Leadership, Council Operations & Financial Health; General Information; and Involvement with NAEPC.

Please consider only the council's activities from May 1, 2023 through April 30, 2024 when completing the application.

The award ceremony is currently planned to take place at the [Annual Estate Planning Strategies Conference during the Council Leadership Conference](#). Each council winning a Council of Excellence Award will be entitled to:

- Complimentary registration for two board members to attend the Annual Estate Planning Strategies Conference the year in which the honor is awarded
- Complimentary group webinars for an entire year (one feed that can be viewed by a group of members in a single location)
- The option of utilizing the "No-charge Speaker Program" with NAEPC covering reasonable travel and lodging expenses to do so
- An announcement of the award in the NAEPC newsletters and on www.NAEPC.org

Additional Awards

The committee may also bestow the "5 Star Council" award, an honor presented to a select group of councils that exhibit strong qualities and employ best practices. 5 Star Councils can take advantage of an entire year of complimentary group webinars (one feed that can be viewed by a group of members in a single location or on a virtual call).



At its discretion, the committee may also bestow the "Emerging Council" award, an honor presented to those councils that have demonstrated significant accomplishment, but have not qualified for the Council of Excellence or 5 Star award.



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As our thank you, all applying councils will receive two complimentary group webinars (one feed that can be viewed by a group of members in a single location or on a virtual call).

Process & Timeline

Councils that wish to apply for the Council of Excellence Award should complete the enclosed application and return it to NAEPC on or before **May 17, 2024**.

Councils chosen to receive an award are expected to be notified via email during August. All councils that were not chosen this year will receive a letter from our national office, postmarked during August.

Guidelines for Completing & Submitting the Application

Councils that have previously been awarded Council of Excellence, 5 Star Council, or Emerging Council status are permitted to apply again in 2024. *This policy is subject to change in future years.*

This application is designed for simplicity and is quick and easy to complete. It's important to note that the application changes slightly from year to year. Please take special care to review each section when completing it.

Those serving on the NAEPC Council Relations Committee, or its Council of Excellence Sub-Committee are prohibited from completing the application.



The final submission should not exceed 25 pages; a single PDF file is preferred. Please ensure that all pages of the application are legible and prepared with an appropriately sized font. For consistency of review, documents other than those specifically requested will be disregarded (examples: financial statements, meeting outlines, bylaws, etc.).

Please contact the NAEPC office if your file is larger than 10MB in size to arrange for an alternative delivery email address. You will receive email confirmation that your application has been received.

Errors / Omissions / Inconsistent Information

Occasionally, errors or incorrect/inconsistent information is found during the committee's review of the application. If NAEPC informs a council of same, the council must respond as requested by the date provided by NAEPC in the follow up notification. Councils that fail to respond or respond after the date requested may be disqualified. Councils that fail to submit information properly and as explained in the application may also be disqualified.

Tell Your Council's Story

The remainder of the application is where you have an opportunity to tell us your story; what makes your council shine. Please check the boxes in each section as appropriate and include narrative for each section. Don't be shy! Although we've given guidance for what you might want to include in the narrative, you are free to include any information you feel fits with the topic of that section.

A Word about the Importance of Narrative - The narrative you provide helps us gain an understanding of the council and its style and member service and assists the review committee in its evaluation. We recommend including hyperlinks to specific areas of the council website or outside websites that contain information specific to your application, when applicable. Narrative should not duplicate items that have been addressed within the application's check boxes or sections that require narrative, but may be used to provide clarification of why a particular box may not have been checked.