



# *National Estate Planning Awareness Week*

## *2013 Affiliated Local Estate Planning Council Informational Kit*

*Provided as a service by the National Association of Estate Planners & Councils  
& The NAEPC Education Foundation*

# Table of Contents ·

Introduction.....3  
About the National Association of Estate Planners & Councils.....4  
About The NAEPC Education Foundation.....4  
Funding.....5  
For Additional Information.....5  
Sample Communications  
    Short Introduction to National Estate Planning Awareness Week.....6  
    Copy of House Resolution 1499.....7  
    Email Text to Affiliated Local Council Membership.....8  
    Press Release for Media Outlets.....9  
    Letter for Related Professional Associations & Nonprofit Organizations.....10

## Introduction •

The National Association of Estate Planners & Councils (NAEPC) is the association of choice for estate planning professionals, providing its 1,700 Accredited Estate Planner® designated professionals and 235+ affiliated local estate planning councils and their 27,000 members with ongoing education and a forum for professional networking within the estate planning community. Through The NAEPC Education Foundation, its educational foundation, and a unique public awareness estate and financial planning website, [www.EstatePlanningAnswers.org](http://www.EstatePlanningAnswers.org), NAEPC has become the centralized resource for estate planning professionals and the public for current and informative content.

As the foremost estate planning organization for professionals, NAEPC has made an ongoing commitment to serve as the leader in promoting awareness of the need for estate planning by a qualified team of advisors throughout the year, and in particular during the third full week in October, now known as *National Estate Planning Awareness Week*. Assisted by Rep. Mike Thompson (D-CA), and 49 additional members of the House of Representatives, H. Res. 1499 naming National Estate Planning Awareness Week was adopted on September 27, 2008. A full copy of the resolution can be obtained by contacting NAEPC or visiting page 7 of this packet.

Estate planning, or family heirloom planning, is an incredibly underserved element of financial wellness. It is estimated that over 120 million Americans do not have an up-to-date estate plan to protect themselves and their family in the event of sickness, accident, or untimely death. NAEPC's goal is to reach every American annually with a warm reminder regarding the need for estate planning and to provide them with high quality educational content and tools through the public estate and financial planning web website, seminars, programs, and relationships. Our fundamental goal is to help the American public cost effectively create and maintain their estate plans, and to help build an understanding of the need to develop a qualified team of multi-disciplinary professionals to do so.

Each year we team up with the American Institute of Certified Public Accountants, the American Association of Attorney-Certified Public Accountants, the American Bar Association Section of Real Property, Trust and Estate Law, the Society of Financial Service Professionals, the National Academy of Elder Law Attorneys, the Partnership for Philanthropic Planning (all members of the Synergy Summit, a unified think tank and voice of leadership for leading financial service organizations), the Financial Planning Association®, and the Association of Fundraising Professionals to make the public aware of National Estate Planning Awareness Week. While this effort has been successful, we still need the help of your affiliated local council to continue sharing the public message –

### **YOU need estate planning TOO!**

As leaders in the estate planning community, you have first-hand experience with the challenges Americans face with regard to saving, investing, and planning for their future. As an estate planning council, you have the ability to make a significant impact in your home community and nationally.

Please note, the remainder of this packet is intended to assist affiliated local councils with local promotion of National Estate Planning Awareness Week. Materials are also available for those councils that wish to plan an "Estate Planning Day" for the public in their home community. Contact the NAEPC office for additional information and to request an "Estate Planning Day in a Box" informational kit.

## **Getting Involved •**

The strategy behind developing this Affiliated Local Estate Planning Council Information Kit and related materials is to provide you with background information on National Estate Planning Awareness Week, while providing and the tools to allow your council to easily participate, with minimal effort, in this exceptionally important event. These materials are designed to assist the affiliated local council by serving as a model that can be used “as is,” easily edited, or customized with contact information for your affiliated local council.

This kit consists of the following files:

1. Short introduction (suitable as a handout at council meetings)
2. Email for council membership
3. Press Release for Media Outlets
4. Letter for local related professional organizations and non-profit organizations

Please consider taking just a bit of time to share the information within this kit with your membership, local media outlets, and the related professional associations nearest you. In the event your council would like to consider hosting an Estate Planning Day, please contact NAEPC for more information or visit <http://www.naepc.org/affiliated-councils/awareness> for a copy of “Estate Planning Day in a Box” and a related PowerPoint presentation suitable for the public.

## **About the National Association of Estate Planners & Councils •**

Over the past 50 years, through the extraordinary efforts of founding members and volunteers, the National Association of Estate Planners & Councils has grown into the association of choice for estate planning professionals, serving over 235 affiliated local councils and their 27,000 members.

It is the mission of the National Association of Estate Planners & Councils to promote the multi-disciplinary approach to estate planning by supporting local estate planning councils and their members and by encouraging the formation of new councils.

## **About The NAEPC Education Foundation •**

The NAEPC Education Foundation, Inc. was formed in 2005 as a 501(c)3 nonprofit organization with a mission to:

- Provide the public with financial awareness programs and improve financial literacy
- Educate the public regarding the benefits of the multi-disciplinary team concept of estate and financial planning as espoused by the National Association of Estate Planners & Councils
- Develop educational programs for estate and financial planning professionals
- Develop and promote a community outreach program for the general public
- Hold educational conferences, seminars, forums, and meetings regarding estate and financial planning

The Foundation’s underlying vision is to significantly improve both the public’s awareness of the need for estate planning by a qualified team of professionals.

## **Funding •**

NAEPC, a 501(c)(6) nonprofit organization, generates operating capital to support its staff and programs through modest membership dues from affiliated local estate planning councils and the Accredited Estate Planner<sup>®</sup> designation program, and contributions of time and money from dedicated professionals.

The NAEPC Education Foundation, a 501(c)3 nonprofit organization, generates operating capital to implement its programs through grants, donations, and contributions from dedicated members, supporting financial service organizations, and the public. Those councils that are interested in making a donation to support the efforts of The NAEPC Education Foundation may do so by visiting <https://www.naepc.org/about/education-foundation/donate>.

## **For Additional Information •**

National Association of Estate Planners & Councils / The NAEPC Education Foundation  
Eleanor M. Spuhler  
1120 Chester Avenue, Suite 470  
Cleveland, OH 44114  
Phone: 866.226.2224  
[eleanor@naepc.org](mailto:eleanor@naepc.org)

# National Estate Planning Awareness Week

## • *An Introduction* •

The following is a short introduction to assist in explaining National Estate Planning Awareness Week. It can be edited as you feel appropriate and distributed at council meetings, posted on the council's website, social media groups, etc., and used as a quick outline for discussing NEPAW to those who may not be aware.

---

---

### National Estate Planning Awareness Week

October 21 – 27, 2013

National Estate Planning Awareness Week was created to address a lack of knowledge among the American public of the need for estate planning by a qualified team of professionals, while combatting common myths and misconceptions like “estate planning is only for the rich.” To assist in this effort, on September 27, 2008, Rep. Mike Thompson (D-CA), and 49 additional members of the House of Representatives, helped pass H. Res. 1499 proclaiming the third week in October as National Estate Planning Awareness Week.

Leaders in the estate planning community certainly recognize the challenges Americans face with regard to saving, investing, and planning for their financial future, and how best to combat these issues.

Did you know?

- The majority of Americans lack the ability to adequately plan for their retirement as most Americans over 65 are totally dependent on Social Security.
- It is estimated that over 120,000,000 Americans do not have an up-to-date estate plan to protect themselves and their families, making estate planning one of the most overlooked areas of personal financial management.

With proper advance planning, issues such as guardianship of children, managing bill paying and assets in the event of sickness or disability, care of a special needs child, long-term care needs, and distribution of retirement assets can all be handled with sensitivity, care, and at a reasonable cost.

National Estate Planning Awareness Week was created to address these issues and their solution – helping the American public understand why it is so important to complete and maintain an estate plan and who best to assist with the process.

**H. Res. 1499**  
**In the House of Representatives, U. S.**

September 27, 2008.

Whereas it is estimated that over 120,000,000 Americans do not have up-to-date estate plans to protect themselves or their families in the event of sickness, accidents, or untimely death;

Whereas a 2004 Roper poll commissioned by the American Institute for Certified Public Accountants found that two-thirds of Americans over age 65 believe they lack the knowledge necessary to adequately plan for retirement, and nearly one half of all Americans are unfamiliar with basic retirement tools, such as a 401(k) plan;

Whereas careful estate planning can greatly assist Americans in preserving assets built over a lifetime for the benefit of family, heirs, or charities;

Whereas estate planning involves many considerations, including safekeeping of important documents, documentation of assets, operation of law in the various States, preparation of legal instruments, insurance, availability of trust arrangements, charitable giving, inter vivos care of the benefactor, and other important factors;

Whereas estate planning encourages timely decisions about the method of holding title to certain assets, the designation of beneficiaries, and the possible transfer of assets during the life of the benefactor;

Whereas many Americans are unaware that lack of estate planning and 'financial illiteracy' may cause their assets to be disposed of to unintended parties by default through the complex process of probate;

Whereas alternatives to disposition of assets after death, such as planned gift-giving, may accomplish a benefactor's goal of providing for his or her family and favorite charities;

Whereas careful planning can prevent family members or other beneficiaries from being subjected to complex legal and administrative processes requiring significant expenditure of time, and greatly reduce confusion or even animosity among family members or other heirs upon the death of a loved one;

Whereas important considerations as to donation of organs and use of life support functions may be made through the estate planning process;

Whereas the implementation of an estate plan starts with sound education and planning, and then may require the proper drafting and execution of appropriate legal documents, including wills, trusts, and durable powers of attorney for health care;

Whereas the third week of October should be designated as 'National Estate Planning Awareness Week'; and

Whereas the National Association of Estate Planners and Councils, representing over 28,000 estate planning professionals, together with the Universal Press Syndicate, the largest independent newspaper syndicate in the world, are prepared to provide such educational information to the public in a focused manner during National Estate Planning Awareness Week:

Now, therefore be it Resolved, That the House of Representatives —

- (1) encourages the distribution of estate planning information by professionals to all Americans; and
- (2) supports the designation of a 'National Estate Planning Awareness Week'.

## Email Text from Affiliated Local Council to Its Membership •

Dear Council Member:

Fall is upon us! I write today to inform you of an incredibly important initiative sponsored by the National Association of Estate Planners & Councils and The NAEPC Education Foundation – National Estate Planning Awareness Week. As I'm sure you are aware, our council maintains a membership with NAEPC and through this relationship you are able to take advantage of the many benefits, programs and services offered by the association. We have decided to team up with NAEPC this year to make you aware of this exceptionally important initiative.

Estate planning is one of the most overlooked areas of personal financial management. It is estimated that over 120,000,000 Americans do not have an up-to-date estate plan to protect themselves or their family in the event of sickness, accidents, or untimely death. This costs the American public wasted dollars and hours of hardship each year that can be minimized with advanced planning.

NAEPC and The NAEPC Education Foundation have an ongoing commitment to promote the need for estate planning by a qualified team of professionals to the public throughout the year, and in particular the third full week in October, known as National Estate Planning Awareness Week. On September 27, 2008 Rep. Mike Thompson (D-CA), along with 49 additional members of the House of Representatives, helped pass H. Res. 1499 proclaiming this essential week.

One of the primary components of this public outreach effort is an online library of public estate and financial planning information. The website, [www.estateplanninganswers.org](http://www.estateplanninganswers.org), is available for all to view. These materials have been written for the public and can be used in conjunction with National Estate Planning Awareness Week. Permission has been granted to copy and use any of the estate and financial planning content on the website during the campaign at no cost. If you have not seen the site in some time you are most encouraged to do so today!

Finally, as you are speaking to colleagues and friends, please begin talking about National Estate Planning Awareness Week!

[enter paragraph about local public outreach efforts here]

[council contact information here]

PS – If you have not recently done so, please visit [www.naepc.org](http://www.naepc.org) to refresh yourself on the many benefits, programs, and services available to you as a member of our affiliated local estate planning council.

Signed by Estate Planning Council President or Administrator

## Press Release for Use with Media Outlets ·

**To:** [FILL IN]

**From:** Joanna Averett, MBA, CFP®, AIF®, AEP®  
President, National Association of Estate Planners & Councils  
Clark B. McCleary, CLU®, ChFC®, AEP® (Distinguished)  
President, The NAEPC Education Foundation  
[COUNCIL PRESIDENT NAME AND DESIGNATIONS]  
President, [COUNCIL NAME]



**Date:** [ENTER]

**Re:** National Estate Planning Awareness Week

---

### Alert: October 21 – 27, 2103 is National Estate Planning Awareness Week

Estate planning is one of the most overlooked areas of personal financial management. It is estimated that over 120,000,000 Americans do not have an up-to-date estate plan to protect themselves and their families in the event of sickness, accidents, or untimely death. This costs the American public wasted dollars and hours of hardship each year that can be minimized with advanced planning. As leaders in the estate planning community, we have first-hand experience with successes and challenges Americans face with regard to saving, investing, and planning for their financial future.

- The majority of Americans over 65 are totally dependent on Social Security.
- The majority of Americans lack the ability to adequately plan for their retirement.
- With advance planning, issues such as guardianship of children, managing bill paying and assets in the event of sickness or disability, care of a special needs child, long-term care needs, and distribution of retirement assets can all be handled with sensitivity, care, and at a reasonable cost.
- Many people mistakenly believe that since they are not “rich” they do not need a comprehensive financial and estate plan.

NAEPC, The NAEPC Education Foundation, and [enter council name] have made an ongoing commitment to help the public understand the need for estate planning by a qualified team of individuals throughout the year, and in particular the third full week in October. To assist us with our commitment, on September 27, 2008 Rep. Mike Thompson (D-CA), and 49 additional members of the House of Representatives, helped pass H. Res. 1499 proclaiming the third week in October each year as National Estate Planning Awareness Week. **This year, October 21 – 27, 2013 is National Estate Planning Awareness Week.**

The National Association of Estate Planners & Councils, formed in 1962 as a non-profit business league, is the leading professional organization for estate planning, providing its 1,700+ Accredited Estate Planner® designees and 235+ affiliated local estate planning councils and their 27,000 members with ongoing education and a forum for professional networking within the estate planning professions. Through its educational foundation, The NAEPC Education Foundation, formed as a 501(c)3 in 2005, and its unique public awareness estate and financial education website found at [www.EstatePlanningAnswers.org](http://www.EstatePlanningAnswers.org), NAEPC is the centralized resource for estate planning professionals and the public as a trusted resource for current, quality financial content and tools. [Enter sentences about EPC here.]

###

For additional information about National Estate Planning Awareness Week, or to schedule an interview with [enter council president name], please contact [enter council president contact details].

## Letter for Use with Related Professional Associations and Local Non-Profits ·

[date]

[Organization contact

Organization name

Organization address

Organization city, state & zip]

Dear [Salutation]:

Estate planning is one of the most overlooked areas of personal financial management. It is estimated that over 120,000,000 Americans do not have an up-to-date estate plan to protect themselves and their family in the event of sickness, accidents, or untimely death. This costs the American public wasted dollars and hours of hardship each year that can be minimized with advance planning.

I write today as the president of [enter EPC name here], an affiliate of the National Association of Estate Planners & Councils, to inform you of National Estate Planning Awareness Week, a national event scheduled from October 21 – 27, 2013. On September 27, 2008 Rep. Mike Thompson (D-CA), assisted by 49 additional members of the House of Representatives, helped pass H. Res. 1499 proclaiming the third week in October as National Estate Planning Awareness Week. A full copy of the resolution can be obtained by phoning the NAEPC office at 866-226-2224.

[insert informational paragraph about affiliated local estate planning council here]

The National Association of Estate Planners & Councils, formed in 1962 as a non-profit business league, is the leading professional organization for estate planning, providing its 1,700+ designated professionals and 235+ affiliated local estate planning councils and their 27,000 members with ongoing education and a forum for professional networking within the estate planning professions, as well as the professional accreditations of Accredited Estate Planner® (AEP®) and Estate Planning Law Specialist (EPLS). Through its educational foundation, The NAEPC Education Foundation, formed as a 501(c)3 in 2005, and its unique public awareness estate and financial education website found at [www.EstatePlanningAnswers.org](http://www.EstatePlanningAnswers.org), NAEPC is the centralized resource for estate planning professionals and the public as a trusted resource for current quality financial content and tools.

Please consider joining the [enter EPC name here], National Association of Estate Planners & Councils, and The NAEPC Education Foundation in promoting National Estate Planning Awareness Week 2013! It is my hope you will make information about the event available to colleagues, friends, and associates. Permission has been granted to [enter business name] to access content found at [www.EstatePlanningAnswers.org](http://www.EstatePlanningAnswers.org) during National Estate Planning Awareness Week. You are encouraged to use the information found within in newspapers, newsletters, magazines, websites, and other forms of communication.

Thank you for your consideration. Please contact me directly at [enter phone number and email address] if I can answer questions or be of service.

Sincerely,

[enter president name]

President