

The NAEPC Education Foundation National Estate Planning Awareness Week

2015

Affiliated Local Council Quick Start Kit

NAEPC &
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The Association of Choice for
Estate Planning Professionals



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HELPFUL HINT

This informational packet was developed for estate planning councils affiliated with NAEPC and provides basic information about National Estate Planning Awareness Week. It's perfect for those councils that wish to participate in National Estate Planning Awareness Week without planning an in-person program. This kit provides councils with the most basic information appropriate for sharing with their membership, the local media, and related professional associations. The materials within can be used "as-is" or modified to meet the needs of your council.

Those councils that wish to plan a face-to-face program are most welcome to do so and NAEPC provides materials to assist. Please contact the national office or visit <http://www.naepc.org/affiliated-councils/awareness> for more information.

Introduction to National Estate Planning Awareness Week ·

Estate planning is an often overlooked element of financial wellness, it is estimated that over half of Americans – 56% – do not have an up-to-date estate plan!

National Estate Planning Awareness Week was adopted in 2008 to help the public understand what estate planning is and why it is such a vital component of financial wellness. Assisted by Rep. Mike Thompson (D-CA) and 49 additional members of the House of Representatives, H. Res. 1499 named National Estate Planning Awareness Week on September 27, 2008.

**Make a difference
by joining us this
October 19 – 25, 2015**

The goal of The NAEPC Education Foundation is to work with the nearly 260 NAEPC-affiliated local councils to reach Americans on a regular basis with a reminder of the need for estate planning and how best to find a team of professionals to assist.

As an estate planning council, you have the ability to make a **significant impact** on the financial wellness of your home community. Start today by planning to share information contained within this kit with members of the council, related professional associations, and the local media.

About The NAEPC Education Foundation ·

The NAEPC Education Foundation was formed in 2005 with the purpose of educating the public and enhancing the educational process for all members of the estate planning team. Its primary focus is on assisting the affiliated local estate planning councils that are members of NAEPC in their public outreach efforts.

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

Contributions from individuals and estate planning councils are welcome and can be made by visiting <https://www.naepc.org/about/education-foundation/donate>. Additional information about The NAEPC Education Foundation can be found at <http://www.naepc.org/about/education-foundation>.

House Resolution 1499 ·

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 supported by [The NAEPC Education Foundation](#); National Estate Planning Awareness Week, scheduled for October 19 – 25, 2015.

Our estate planning council is a member of the [National Association of Estate Planners & Councils](#) and through this relationship you are able to take advantage of many [member benefits](#) and discounts offered by the association. This year, we have also decided to work with The NAEPC Education Foundation to help spread awareness of National Estate Planning Awareness Week.

Estate planning is a critically overlooked component of financial wellness. It is estimated that 56% of Americans do not have an up-to-date estate plan. This causes hardship, financial or otherwise, that can be diminished by advanced planning. National Estate Planning Awareness Week exists to help the public understand the need for estate planning, and who the qualified team of professionals is that stands ready to assist. In essence, the members of our EPC!

National Estate Planning Awareness Week was adopted in 2008 to help the public understand what estate planning is and why it is such a vital part of financial wellness. Assisted by Rep. Mike Thompson (D-CA) and 49 additional members of the House of Representatives, H. Res. 1499 named National Estate Planning Awareness Week on September 27, 2008. For a full reading of H. Res 1499, please visit <http://www.naepc.org/about/education-foundation/documents>.

As you are speaking to colleagues and friends in the days to come, please begin talking about National Estate Planning Awareness Week! It is with your help that we will “spread the word” about this exceptionally important initiative. **[Optional Sentence:** Our council will be sending press releases to local media outlets in the hope that mention will be made in print and online publications, as well as on the local television stations during National Estate Planning Awareness Week.]

[enter paragraph about any other local consumer outreach efforts here]

[enter any other information the council wishes to communicate here]

[Signed by Estate Planning Council President or Administrator]

[council contact information here]

PS – If you have not recently done so, please visit 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.

Press Release for Use with Media Outlets ·

FOR IMMEDIATE RELEASE:

CONTACT:

[Contact Person

Estate Planning Council Name

Voice Phone Number

Fax Number

Email Address

Website URL]

HELPFUL HINT

It is recommended this press release be sent mid-week during the week prior to National Estate Planning Awareness Week

October 19-25, 2015 IS NATIONAL ESTATE PLANNING AWARENESS WEEK

[City, State, Date] – More than half of Americans, an estimated 56%, do not have an estate plan in place, making estate planning a critically overlooked component of financial wellness. This creates hardship, financial or otherwise, that can be diminished by advanced planning.

National Estate Planning Awareness Week ([H. Res. 1499](#)) was adopted on September 27, 2008 to help consumers understand estate planning and its need, along with how best to create a qualified team of professionals to assist in the planning process.

Estate planning encompasses the growth, conservation, and transfer of an individual's wealth through the creation and maintenance of an "estate plan." The purpose of estate planning is to develop a strategy that will maintain the financial security of individuals through their lifetime and ensure the intended transfer of their property and assets at death, while taking into consideration the unique circumstances of the family and the potential costs of different methods. A properly-created team of professionals may include, but is not limited to, the attorney, accountant, trust officer, and credentialed insurance financial planners, all working together for the benefit of their client.

ABOUT [ENTER EPC NAME HERE]

[This section should start with a one-sentence description of your EPC and what it provides to consumers, including a notation that the council is a non-profit organization. A second sentence can add mention of a list of members and a brief history of the organization.] The Council is a member of the [National Association of Estate Planners & Councils](#), the leading professional organization for estate planners, which provides its 1,800 Accredited Estate Planner[®] designees, and 260 affiliated local estate planning councils and their 29,000 members with ongoing education and a forum for professional networking. For additional information contact: [enter council president or designated board member contact details].

– END –

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

[date]

HELPFUL HINT

Place this text on the
letter head for your EPC

[Organization contact

Organization name

Organization address

Organization city, state & zip]

Dear [Salutation]:

October 19-25, 2015 is National Estate Planning Awareness Week!

Now that I have your attention, I write to you today in my role as the [enter officer title] of the [enter Estate Planning Council name]. Our council has teamed up with The NAEPC Education Foundation to support National Estate Planning Awareness Week. Adopted on September 27, 2008, this week-long event was created to help consumers understand estate planning and its need, along with how best to create a qualified team of professionals to assist in the planning process.

I'm sure it's no surprise to you that estate planning a critically overlooked component of financial wellness. It is estimate that more than half of Americans, a staggering 56%, do not have an estate plan in place! Our estate planning council is working with The NAEPC Education Foundation to combat this challenge so I write today to ask for your assistance in sharing information about National Estate Planning Awareness Week with the membership of [enter sister organization or company name here], an organization we consider to be closely aligned with our EPC.

[enter EPC name], in an effort to "spread the word" has shared information about National Estate Planning Awareness Week with our entire membership, [enter more efforts here]. If you'd like, I would be happy to share these documents with you for your use as well.

Please consider joining the [enter EPC name here] in celebrating National Estate Planning Awareness Week 2015!

Your consideration is most appreciated. Please contact me directly at [enter phone number and email address] if I can answer questions or be of service.

Sincerely,

[enter writer name]

[office within council]