

National Association of Estate Planners & Councils

Member Council Resource

BUILDING RELATIONSHIPS WITH NEARBY COUNCILS

Affiliated Local Estate Planning Councils provide a "home" where professionals from specific disciplines meet and share their common interests through various activities. These periodic meetings/events offer the opportunity to learn, network, and enjoy the camaraderie created by their overlapping professional interests.

It is interesting to note that council membership, at least in New Orleans, is very stable with many members often participating until retirement. Nearly every member also has a *primary professional association* like the Society of FSP, FPA NAIFA, AICPA, ABA, NCPG, etc., so it is likely that most belong to at least *two professional organizations*. The common thread being a shared interest in estate planning as well as the fact that these professionals often work together as a team on estate planning cases.

Like many organizations with long term members, aging affects membership stability which in turn depends on attracting new younger members. Accomplishing this goal can be as simple as reaching out on a personal level, or making an out reach to the primary organizations they consider their "professional home". Often just a personal invitation to attend a council meeting will suffice, or perhaps by sharing meeting/event information with their primary organization(s). In addition, councils may wish to explore Junior and/or Student memberships as a way to engage members earlier.

It is our observation that quite often our councils as well as other organizations with adjacent councils/chapters do not regularly share meeting or event information that could be mutually beneficial. These councils/chapters may be geographically close, perhaps a 30-45 minute drive yet there is no periodic communication sharing.

NAEPC suggests to all councils a "**Caring and Sharing**" approach that will *enhance the awareness of the many rewards of council membership* with adjacent EPC councils as well as the primary organizations to which our members also pay dues.

Sharing meeting/agenda information with adjacent EPC Councils:

- Provides the opportunity to participate in additional educational events as well as networking activities
- May act as a bond between a weaker/less active and a stronger/more active council; both may benefit from the relationship
- Sharing of ideas and possibly resources can be beneficial
- Cross posting of events on adjacent chapter websites

Sharing meeting/agenda information with member's primary organization:

- Can be a good source of new EPC members. Great way to sustain and grow EPC membership
- The primary organization may have an interest in the topics being presented by the EPC and recommend/share speakers at times
- Good way to keep the organization in the loop with local EPC events and foster a relationship
- Possibility of hosting a larger "joint" event of common interest and sharing speakers

As a well known hockey star once said "*You miss 100% of the shots you never take*". By expanding the universe of local councils to be more inclusive with other councils as well as our member's "professional home" organizations, a council has multiple opportunities to grow and prosper.

Is it a shot worth taking?

The Association of Choice for Estate Planning Professionals