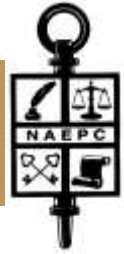


Council by Size Notes



Council by Size – Extra Large

Membership

Dallas / Houston EPC – accepts anyone into membership; requires 3-years minimum practicing as well as a designation.

Philadelphia EPC

Saw a major decrease in membership beginning in 2008, but has since seen the membership grow and they attribute it to the push with millennials.

Offering CE credit is an influencer for membership.

Emerging Member – 2-3 years as an associate member, possibly being sponsored by a board member or leadership. Also included are the older age group that may have recently had a career change and are looking to build their base and network.

Most Popular Events:

- Washington DC EPC – Wine decanting event and program
- Cleveland EPC – Annual Meeting for Distinguished Estate Planners; Heckerling review
- Houston EPC – Steve Akers speak annually
- Philadelphia EPC – 75th Anniversary event (2-years ago); golf and tennis outing; luncheons; annual meeting; good end of life panel does well; happy hours for younger / upcoming members at local upcoming bars
- Chicago EPC – Distinguished service luncheon where the recipient is the tech speaker; luncheons
- Boston EPC – Gala draws 600+ members – firms buy tables; golf tournament (9 and 18 hole options)

Event Ideas, etc.:

- Antiques Roadshow – bring in an item to appraise by an antiques expert
- Speed networks
- Events scheduling
- Reserve money reinvesting
- End of life
- Bring someone in from the IRS
- Emerging and associated member events
- Mentorship
- Extra fee for CE
- Youth market / social media

Council Leadership Day – November 6, 2018

55th Annual NAEPC Advanced Estate Planning Strategies Conference