

# Council by Size Notes



## Council by Size – Extra Small and Small

- Aging membership. Need new, younger members.
- Time of day may affect new member interests. Evening meetings may discourage younger members from attending.
- Need more diversity in membership (professional background) – need more attorneys.
- Need to provide CE.
- Desire to increase involvement from members.
- Some members are looking at membership as a networking tool. Members may not be getting everything need.
- Would like to create interest for Trust Officers and CPAs.
- In order to ensure that people attend meetings, it was noted that specific dates to attend could be assigned to board members.
- Favorite speakers / topics – probate court was a popular topic.
- It was noted that national speakers seem to be prepared.
- Credential categories is a challenge for Naples.
- Estate Planning Day – a council reported it being very successful. Provided direct contact.

**Siouxland EPC** is pushing the CE component. They use to have all evening meetings at a country club, but now have all lunches. They only have their meetings at one location. Membership dues are \$175. They hold 6-8 speaker events per year.

**Madison EPC** has a specific person who files all CEs. Ethics credit is a big drive.

**Berkshire County EPC** now has all breakfast meetings, based on member preferences.

**Redwood Empire EPC** reported that they are lacking board members in certain disciplines: CPA, JD, fiduciary, financial planners. They have a lot of TOs in the area, but not a lot who are members. They also have a lot of reverse mortgage providers but they do not necessarily want to be members.

Question how to recruit philanthropy – limit to a community foundation or a council on aging.

**Stanislaus County EPC** – Reported an influx of fiduciary members in the last year. Their membership dues are \$225 per year and hold 5 lunch meetings and a fall seminar which is a separate fee.

**Mid Florida EPC** – Membership dues are \$150 per year. They hold 5 meetings per year in a retirement venue.

Council Leadership Day – November 6, 2018  
55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

**Cape Cod EPC** – They are losing members. They have a core 40 members who attend every meeting. Philanthropy Day – members can go to Philanthropy Day at a discount.

**Huntsville EPC** – Membership is \$175/year, which includes meetings. Venue is free so even after food expenses, they still operate in the black. They reported that approximately 40% of their membership shows up to meetings.

**Quad Cities EPC** – Report having \$20,000 in the bank and they're trying to decide what to do with it. They do not get sponsors.

**Easter Island EPC** – Charge \$200/year in dues and \$215/year for attorneys, and do not charge per meal. They have one meeting a month from May through January.

**Rockland County EPC** – Charge \$275/month in dues. They have 4 dinners a year and Estate Planning day and hold socials throughout the year.

**Berkshire EPC** – Charge \$100/year in dues and hold all breakfast meetings. They have 4 speaker events/year and have Webex or NAEPC webinars. They have 78 members and approximately 50-65 members participate. They have \$10,000 in the bank.

**Northwest Florida EPC** – Charge \$175/year. Hold 4 cocktail events with a light dinner as well as an annual formal dinner. They participate in Estate Planning Day and have a part-time administrator. They cover the nomination fee for AEP application. They said they'll have to raise dues or bring in sponsors.